

MENTORING **SPARK**

Quick ideas to light up your doctoral conversations.

► PROJECT PLANNING



SOLUTIONS FOR STUDENTS

Developing a project plan is a great first step to helping students have a sense of direction as they navigate their graduate careers. However, it is easy to establish a plan based on what *can* happen, versus what is *likely* to happen. As an example, a committee meeting may be “planned” for December by a student, but may need to be changed by a week (perhaps a faculty was not consulted or their schedule changed) – which could result in months of time lost later in the project.

When such scheduling delays happen, or when more refinement of work is needed than anticipated, students may lose confidence on when (or if) they will finish their degree, communication and relationships may be stressed, and they may become frustrated with people, not just the process.

The purpose of this document is to help students develop realistic plans and think through potential barriers to achieving their goals (*especially related to time*). The purpose is not to design a comprehensive project plan; that will be discussed in the final project planning document.



LEVEL 1: GOAL SETTING

LEVEL 2: BEING PRAGMATIC

LEVEL 3: PROJECT MANAGEMENT



FACULTY FYI

This **Spark** is intended to support students with the practical/experiential aspects of project planning, versus the theoretical, purely success-driven, and/or isolated planning that tends to occur early in one's career.

Planning is a first step for a successful project, but the plan must be reasonable and have contingencies for when “life happens” in order to be a good plan. Often, students with little experience in project planning do not know what a good project plan looks like. As the faculty mentor, you are able to help students develop a reasonable, actionable project plan. As students become more pragmatic regarding times and milestones, it should reduce the number of setbacks and time spent “re-planning” work.



ACTIONS FOR FACULTY

- Show students example project plans and/or schedules from grant proposals you have written and how you track the work after winning work. Point out areas where changes were necessary and how they were handled.
- Ask students—who should have several goals documented—to show and explain their plans. Have the student articulate their top concerns for accomplishing the goals, and the top reasons why they can meet those goals. Work with students on developing contingencies to mitigate their top concerns.
- Ensure all students in your research group know which tools are used to track the research team goals (e.g., scheduling lab time or meeting times, developing research team goals). This can be part of the on-boarding of new students.

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A RESOURCE FROM:



Use this QR code to access this and other *Mentoring Spark* tip sheets:





DIGGING DEEPER

- There are many tools available to help with project planning. They can be standalone, cloud based, collaborative, etc.
- For this particular **Spark**, action trackers and schedules are key tools. Examples include using excel, MS Project, Monday.com, SharePoint, Teams, etc., for project planning.
- Developing a presentation of the plan – this is a tool as it requires students to think through the interactions of the resources, schedule, timing, risks, etc., to develop the presentation.

*Please visit the **RDI Mentoring Sparks website** for examples and links to these tools and resources!*



EXERCISES FOR STUDENTS

1. If the student participated in the Level 1 Project Planning, they can use the same exercise project. Otherwise, have the student pick a project that involves using shared resources (*e.g., equipment, materials, people, or space*). Have the student present the plan, identify the top three risk areas, and provide contingency plans for those risks. Have students do this with each other so that they are both the presenter and the person critiquing another student's plan.
 - a. If students struggle to articulate concrete risks, use the time to discuss risks of **quality, time, resources, cost**, and to then think of a risk for each category.
2. Conduct mock project/design, thesis defense reviews. These should be short, 5- to 10- minute presentations with short Q&A sessions. Have students present their plan for completing one of their goals to the research group, then have the research group ask questions and “challenge” the plan.



REFLECTION & NEXT STEPS

- **Student: Tool Usage** – The types of tools for tacking goals and tasks are as varied as the people using them. If a tool is not working for you, try a different tool. Ask yourself which features are helpful, which are not. What style works for you – Excel, cloud-based, color-coded, chronological, grouped by resource needed, grouped by goals, etc.
- **Faculty: Experience** – Think about your experience with projects. What tends to slow you down? What tends to cause you stress? Ask yourself what you can do to be more efficient and less stressed.
- The ability to develop pragmatic plans to accomplish goals is a critical step in developing comprehensive program plans. Explain to students that building blocks can be thought of as **1) set a goal, 2) plan to achieve a goal, 3) integrate a group of goals to achieve a higher-level goal, 4) repeat as program sizes increase.**



ACTIONS FOR FACULTY

- Help them think of their graduate time as a project that is a stepping stone of their career with the goal of graduating.
- Provide time and space for students to gain experience. Presenting a thorough plan and defending it is a learned skill set. Practicing (as opposed to merely watching) is an important tool to gain those skills, and practice in a non-threatening environment is important to students' growth.
- Discuss the importance of being pragmatic. Life happens and though a “stretch goal” can be an ideal goal, the norm is that as plans progress, some change will be required. Thus, students need to be flexible and able to adapt to the change.
- **GOAL Setting:** Agree on a goal for the student related to required degree milestones, developing a project plan for a journal article, or, perhaps, a generic project plan outline.

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