



Maine Memory Network

Basic Project Planning Guide

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Once your organization or team has begun its participation in Maine Memory—whether through a grant program, working independently as a Contributing Partner, or via another avenue—its important to undertake some basic project planning to ensure a successful outcome to your experience.

In addition to consulting the Team Member Roles and Responsibilities and the Roles and Responsibilities Worksheet documents on the MMN Resources page to identify who is doing what, you need to determine how the group will function smoothly as a team. Here are the various processes that must be discussed and put in place before you can get down to work.

GENERAL COMMUNICATION

Your team coordinator is generally the point person for group communication. Early on, he or she should:

- Set up an email distribution list to quickly and easily send messages;
- Send out reminders prior to monthly meetings;
- Consider creating a virtual space to keep in more consistent touch, exchange ideas, and post resources (a Wiki, Ning, blog, etc.);
- Keep track of general team progress and communicate it to the larger group;
- Pass on information and requests from MHS as necessary;
- Update members on changes (new/dropped members, revised contact info);
- Contact town officials/VIPs as necessary to make them aware of the project.

All team members should efficiently and clearly communicate their progress with each other during meetings, via email, and during work sessions.

MONTHLY MEETINGS

Regardless of the size and scope of your project, you should establish a regular and consistent meeting schedule. The Maine Community Heritage Project has a structured monthly meeting schedule that lasts

for 10 months, but even the shortest-term projects should not leave meetings to chance. Come up with a meeting schedule that everyone can agree on as soon as possible.

Your meetings should be attended by most, if not all, of the core members of the project team. Additional members should be invited as relevant, depending on the topics being discussed during the given month. *If your project involves a school, we strongly encourage you to consider having one or more students on your planning team in some capacity—either as core or additional members.*

Most meetings will be facilitated by your project coordinator. Depending on the month, Maine Community Heritage Project meetings may be facilitated by the project coordinator, an MHS staff member, or a combination of the two. The facilitator takes responsibility for creating an agenda for the meeting, assigning parts of the agenda to other team members as necessary, and keeping the meeting focused and on time.

On average, 90 minutes to two hours should be set aside for team meetings. While some meetings may take less time than that, each team member should set aside at least that amount of time so that nothing else gets scheduled close to MMN project meeting time.

Monthly team meetings might be used for the following, depending on the size and scope of your project:

- Discussing team roles, responsibilities, milestones, changes, challenges;
- Introducing new project components and concepts (possibly involving training);
- Planning, and assessing the progress of, activities;
- Troubleshooting if activities are not progressing as efficiently as hoped, or deadlines are in danger of not being met;
- If applicable, reviewing equipment purchases and tracking grant spending in general;
- Activity support work such as: viewing collections, choosing items to scan, reviewing any written work/suggesting revisions; reviewing any storyboarded work; reviewing/suggesting revisions to online exhibits and website pages
- Community event planning; and
- Other administrative items as necessary.

NOTE: These monthly team meetings are NOT when most of the actual work on project activities takes place. Team members should understand that scanning, research, writing, and online work will not take place during these meetings but, rather, during separately scheduled work sessions.

MEETING VENUE

Settling on a venue for your regular meetings should be a group decision. Consider these questions when determining where to meet.

- Have we chosen a consistent meeting time that satisfies the needs of most, if not all, of our core team members? Can the space accommodate everyone or will we need extra chairs, tables, etc.?
- Who will be in charge of unlocking/locking up if necessary?
- We will have refreshments at our meeting? (Are they allowed?) Who will take care of that and should we rotate that responsibility?
- How will we alert people if a meeting date/time has to be change?
- Who will take minutes at the meeting?
- If necessary, how will collection items be transported to the meeting?

PROJECT ACTIVITIES WORK

DEVELOPING A TIMELINE/CALENDAR

One of the smartest things your organization or team can do once you have a handle on the activities involved in your project is create a timeline or calendar that charts out the activities step by step.

A **timeline** is simply a list of dates—or, in visual terms, a straight line with dates marked off—each of which has a milestone or deadline listed next to it. Include every single activity you can think of that relates to your project, from team meetings to visits to the historical society to the digitizing process to anything beyond that, as applicable (the creation of exhibits, the building of websites, community events, publicity efforts). Be sure to break larger processes into manageable chunks. For example, your timeline might show a marker of “Scan and catalog 10 items” on one date and then “Scan and catalog 10 items” again two weeks later.

A **calendar** is nothing more than a glorified timeline. Instead of a simple list or line of dates, the calendar breaks the project into month headings (or, visually, into a literal calendar with blank spaces to

fill in). Then you can insert (in bulleted or other format) a list of dates under each month of the various deadlines due with detailed information about each. The Maine Community Heritage Project has a **formal calendar** created by MHS. While the MCHP lasts nearly a full year and has multiple activities, even a short-term, smaller-scope project can benefit from a tightly-designed calendar. Maine Memory staff will be glad to work with your group to custom-design a calendar for your project.

DEVELOPING A WORKPLAN

As noted above, the actual work on Maine Memory project activities takes place between your monthly meetings. How you schedule the time and venue for project activity work is entirely dependent on the components of the work itself (what you've just laid out in your timeline or calendar), as well as who is doing a particular activity and where he or she can most conveniently do it. The work process will look different in every community.

While having a consistent work time—weekly, bi-weekly, or monthly—is ideal, it won't always be possible, or even necessary. Your project may require multiple types of work, and they may happen at varying paces. In addition, you may have different individuals or groups of people working at different times by necessity—students, for example, who must meet within the confines of a rigidly-structured school day. (Or students may take on one isolated chunk of the project and meet more frequently than other team members could—daily, for example—for a short period of time within the project year.)

What matters most is that you come up with a workable schedule based on the needs of the individual activity, the person or people doing that activity, and the goals you've set for your group, or the deadlines put in place by MHS. Everyone on the team should be aware of the varying work schedules and know well in advance which schedule(s) concerns him or her.

Here are some questions to consider when setting up work schedules, and the process by which project work gets done.

- What does the chain of reporting look like? How will various activities be reported on during meetings?
- If needed, who will transport equipment and/or collection items to a work site? Who will transport them back? Do they need to be officially checked out before they are moved? Can they be safely stored?

- If an activity is taking place at the Historical Society (or Library, or other venue) and students are involved, what needs to happen to transport students to the off-site venue? Do grant, or other, funds need to be used for transportation? Do parents need to sign release forms?
- How will student work get done—in large groups, small groups, or individually?
- If the activity involves handling collections items, who will supervise the access to and use of the items?
- Does one person or group need to finish an activity in order for another person or group to begin? Or, if the work must be woven together or connected concurrently, what is the process for doing so?

To help sort out these questions and come up with a structured plan that everyone can have access to, consider completing our **Work Plan Worksheet** as part of your planning process.

TROUBLESHOOTING

As earnest, committed, organized, and enthusiastic as your organization or team is, unexpected challenges may arise. That's life, of course, and you should do your best to take it in stride and find a way to continue on in the most efficient and productive way possible. **Please** let MHS know as soon as possible if any of these challenges come your way. We are here to help!

What do you do if...

- **A member of your group drops out.** Find someone to take his or her place as soon as possible. If that isn't feasible, discuss how you might have to revise your project plans to accommodate for the loss. Can another person take up the slack, or will you have to scale back?
- **Teachers get re-assigned.** This happened in the first Maine Community Heritage Project cohort—a 20-year Social Studies teacher was reassigned to the math department after the project year began. While that may be an extreme example, schools are always in flux, especially over the summer. The teacher that signed on last spring may find, come fall, that participating is no longer feasible. If that's the case, ask the teacher for replacement suggestions before he/she leaves, and contact the principal to explain the situation and get his or her blessing.

- **One or more individuals have different goals or ideas about the group or project than everyone else.** Perhaps this individual regularly shows up late, falls behind in his or her work, or treats the group as a social club. The project coordinator should pull this person aside, remind him or her what the project's goals are, express the group's concerns (with concrete examples), offer to re-examine the individual's workload (if he or she has simply taken on too much), and ask for a renewed commitment to the project's scope as understood by the team as a whole. Otherwise, you risk part, or all, of your project veering off course.

MORE INFORMATION

Visit the [Share YOUR Local History](#) section of the Maine Memory Network website, www.MaineMemory.net.