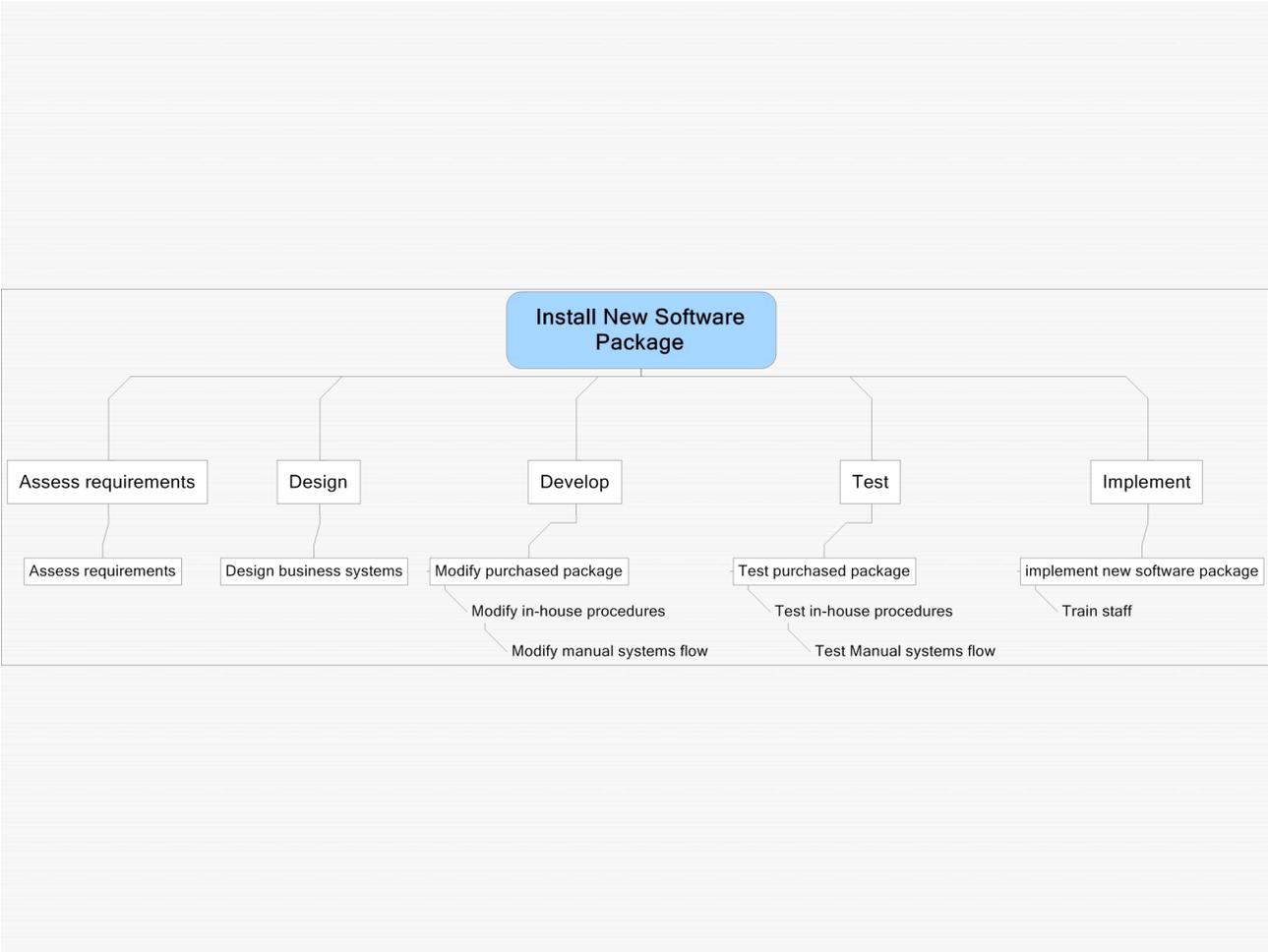


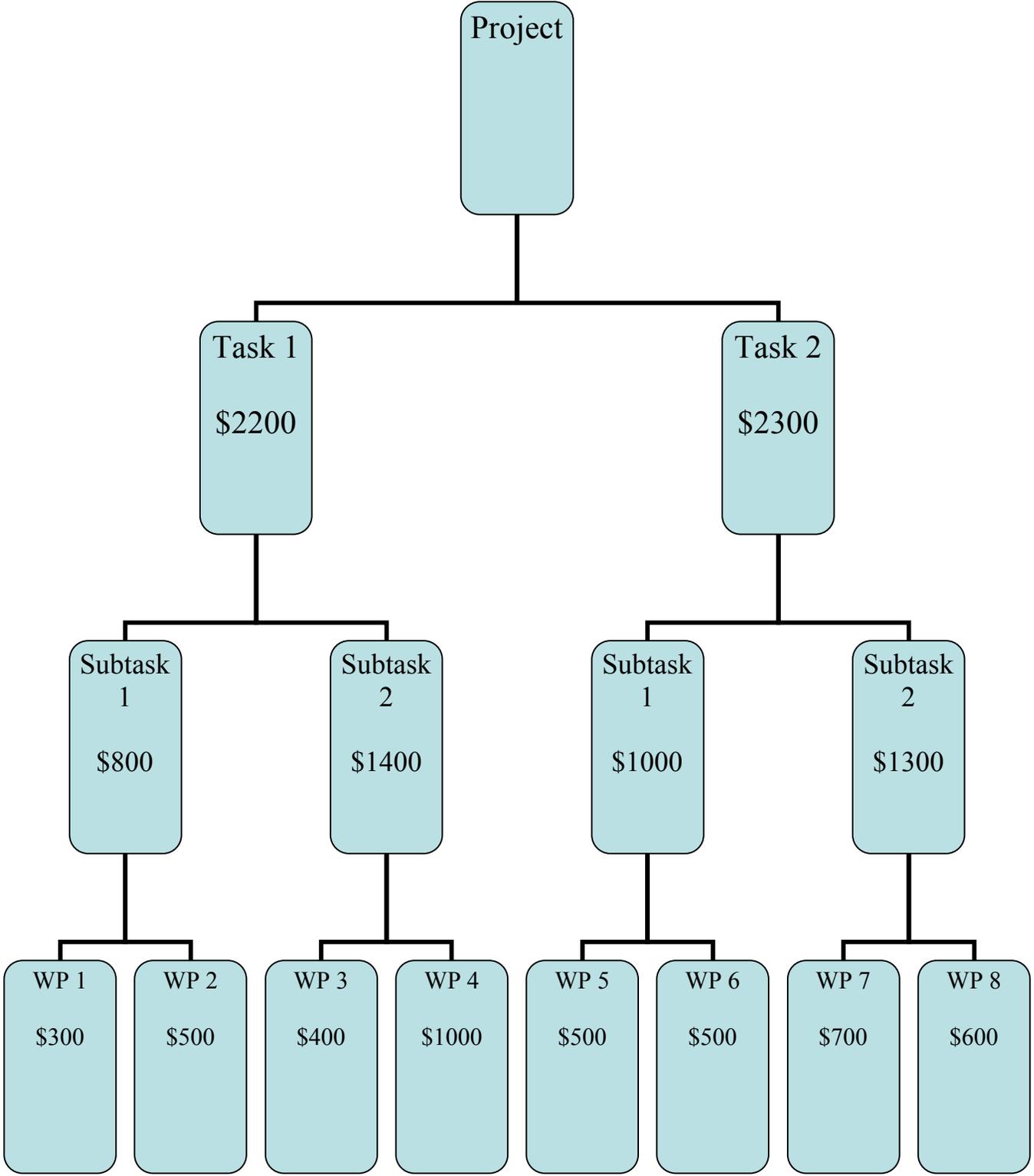
Work Breakdown Structure



Work breakdown structure tree chart for a sample project

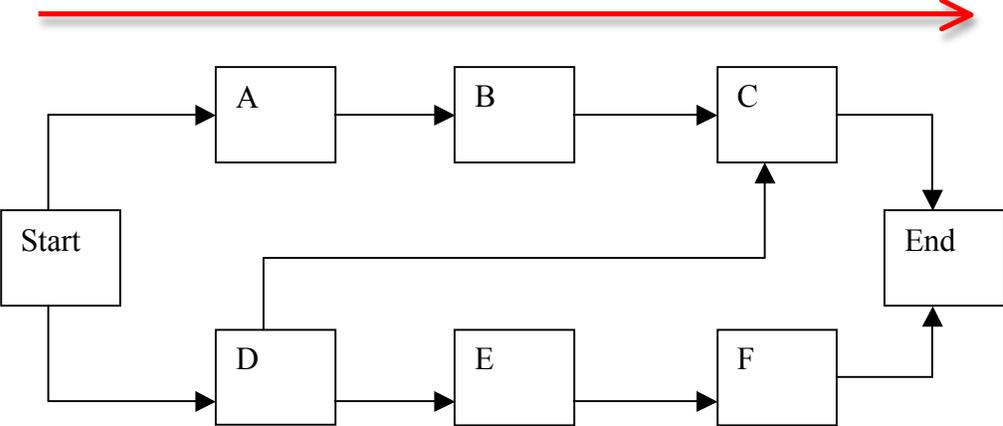
Knutson and Bitz (1991) Project Management: How to Plan and Manage Successful Projects, Amacon/American Management Association.

Work Breakdown Structure and Budget Development



Lewis (1995) Project Planning, Scheduling and Control: A Hands-On Guide to Bringing In On Time and On Budget, Probus Publishing Company.

Network and Critical Path (Marked in Red)



Gantt Chart

		Jan				Feb				March				April			
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
Task	Duration																
1	1 month	█	█	█	█	█	█	█	█								
2	2 month			█	█	█	█	█	█	█	█						
3	.5 month				█	█											
4	1 month							█	█	█	█						
5	.5 month											█	█				
6	1 month													█	█	█	█

Gantt Chart with milestones

		Jan				Feb				March				April				
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	
Task	Duration																	
1	1 month	█	█	█	█	█	█	█	▲									
2	2 month			█	█	█	█	█	█	█	█	█	█	▲				
3	.5 month				█	█												
4	1 month							█	█	█	█							
5	.5 month											█	█					
6	1 month													█	█	█	█	▲



Due Date

## Project Plan Approval

Project Plan Approval		
Project Description	Project Code	Date
From	Department	Return by:
Your signature below indicates that you agree with the plan submitted so far as your interests are concerned.		
Approving Individual	Signed	Date
Functional Managers		
Directors		
Project Manager		
Outside Stakeholders		
Comments		

Lewis (1995) Project Planning, Scheduling and Control: A Hands-On Guide to Bringing In On Time and On Budget, Probus Publishing Company.

# Monthly Project Status Report

General Information:	
Agency name:	Date:
Contact Name:	Phone:
Project ID:	For the period beginning:  and ending:
Name of the project:	
Project Start Date:	Current Phase:

## Key Questions

- 1) Has the project scope of work changed? Yes/No
- 2) Will upcoming target dates be missed? Yes/No
- 3) Does the team have resource constraints? Yes/No
- 4) Are there issues that require management attention? Yes/No

If any of the above questions is answered "yes", please provide an explanation of the "yes" answer.

### Key Milestones for the Overall Project revised on <date>:

Milestone	Original Date	Revised Date	Actual Date

### Milestones Planned for this month and Accomplished this month:

Milestone	Original Date	Revised Date	Actual Date


**Accomplishments Planned for this month and not completed:**

Milestone/Item/Accomplishment	Original Date	Revised Date
1)		
2)		
3)		
4)		

For each item listed above, provide a corresponding explanation of the effect of this missed item on other target dates and provide the plan to recover from this missed item.

**Items Planned for Next Month:**

Milestone	Original Date	Revised Date

*(Use a chart like the following to show actual expenditures compared to planned levels. Break the costs into other categories as appropriate.)*

Year-to-Date Costs (000)				
Fiscal Year 20__	Actual Costs to Date	Estimate to Complete	Total Estimated Costs	Total Planned Budget
Personnel Services				
Prof. & Outside Service				
Other Expenditures *				
Total Costs				

*(Use a chart like the following if this project spans more than one fiscal year.)*

**Year-to-Date Costs (000)**

<b>Grand Total For Project</b>	<b>Actual Costs to Date</b>	<b>Estimate to Complete</b>	<b>Total Estimated Costs</b>	<b>Total Planned Budget</b>
------------------------------------	-------------------------------------	---------------------------------	--------------------------------------	---------------------------------

Personnel Services

Prof. & Outside Service

Other Expenditures \*

Total Costs

**\* Other Expenditures include hardware, software, travel, training, support, etc.**

*Attach the current risk list.*

*Attach the current issues/action item list (for the significant items that need management attention)*

<http://www.dir.state.tx.us/eod/qa/monitor/status.htm>

## Interdisciplinary Research Project Charter

Author: Stan Ruecker

PROJECT NAME:

DATE:

Principle	Policy
<p>We are interested in disseminating the results of this project as widely as possible, with credit to us for doing it.</p>	<p>Project members may use any of it as examples in presentations, papers, interviews, and other media opportunities. They may post any of it to their web sites. Wherever possible, they should mention the names of the other project members who were directly involved, as well as the name of the project.</p> <p>The project team will maintain a collaborative project web site, which will contain links to all the presentations and publications of the group.</p> <p>For presentations or papers where this work is the main topic, all team members who worked directly on this subproject should be co-authors. Any member can elect at any time not to be listed, but may not veto publication.</p> <p>For presentations or papers that spin off from this work, only those members directly involved need to be listed as co-authors. The others should be mentioned if possible in the acknowledgments, credits, or article citations.</p> <p>Team members should discuss possible publication venues before submitting abstracts or articles.</p>
<p>We intend this work to move forward at a steady pace, given due awareness of the vagaries of life.</p>	<p>Project members will make every effort to attend meetings as arranged and to keep in regular contact by email or other electronic means. Frequent absence may result in being warned, then cautioned, then asked to leave the team.</p> <p>Project members will jointly establish and attempt to meet self-imposed deadlines, in part through providing the project administrator with lists of commitments, so that reminders will be sent out as a matter of routine.</p> <p>In the event the task is overdue by a considerable amount of time (for instance, whichever is lesser—two months, or double the original timeframe), other members may at their discretion notify the offender that the task will be re-assigned, without prejudice to the constitution of the team or the public credit of any member.</p> <p>Project phases will be arranged so as to minimize the need for sequential completion of one phase before another can begin: wherever possible, phases will run in parallel, with communication occurring between people as they work on each phase, rather than waiting to communicate until the end.</p>
<p>We would prefer for this work to be funded.</p>	<p>Project members will watch for and notify each other of funding opportunities and participate wherever possible in the writing of appropriate grant proposals.</p>



**DRAFT EMiC UA PROJECT CHARTER**  
**FIRST (RYERSON CONFERENCE) ITERATION**  
(revised November 9, 2011)

Trust Cluster Principles and Policies

**Collaboration**

Principle #1: We will work collaboratively, that is, we want and need to learn from one another.

Principle #2: As a DH “collaboratory” in a university setting, we place a high priority on fostering graduate student development in all areas (including in the acquisition of collaborative skills).

Principle #3: Collaborators are people who sign the charter, that is, membership in EMiC UA is defined by an individual’s acceptance of the principles, policies and practices of the collaboratory.

Policy: Research assistants are encouraged to sign the project charter when they begin their work with EMiC UA and thus become collaborators. They are also encouraged to expand their participation in the collaboratory beyond simply putting in their hours.

Policy: Research assistants are eligible for EMiC UA and EMiC Dal funding to attend DEMiC and TEMiC and to present conference papers as part of one or more of the project groups.

Principle #4: We will strive to keep the administrative structure of the collaboratory as simple and as “horizontal (that is, as non-hierarchical) as the needs of the project permit.

(The principle here is the less bureaucracy the better. The untested assumption is that, mentoring apart, collaboration thrives in the absence of hierarchy.)

Policy: Given the developmental nature of the work EMiC UA is undertaking, the administrative structure of the collaboratory should be kept not only simple and non-hierarchical but as malleable and flexible as possible to enable us to respond effectively and efficiently to the many changes development brings.

Principle #5: We will work within schedules and to deadlines arrived at collaboratively.

Principle #6: All collaborators have the right of first refusal on ensuing stages of the project.

**Credit**

Principle #1: All work undertaken to advance EMiC UA projects is equally deserving of credit. (Giving credit speaks to the ethos of the project itself).

Policy: EMiC UA will be credited as an organizational author on all publications; we will additionally use author listings, notes, and acknowledgements as differing levels for attributing credit on our work.

Policy: All participants will be listed on the project website, including dates and roles; the website provides an ongoing record of contributors and contributions.

Principle #2: We recognize the need for credit as a part of academic advancement. (This follows from our commitment to mentoring and to our support for the completion of academic programs as part of EMiC UA project work.)

**Documentation**

Principle #1: Collaboration is rooted in good, clear documentation, both as a means of understanding one other's work and as a means of distributing credit.

Principle #2: Documentation is necessary not only for the purpose of informing other group members and continuing workflow but in support of grant applications and reports.

Principle #3: We will document our work as it arises from the rhythms of the project. (Documentation will be geared around project planning, dissemination and reporting.)

Principle #4: A task is not completed until the documentation is shared. The primary site for documentation is the wiki.

Principle #5: Documentation is meant as a support; therefore, documentation responsibilities will be kept to a minimum amount possible (so that the work can be done) while ensuring that a sense of the project's development is recorded (so we can see where the project has been).

Principle #6: All documents, including working documents, generated by the group are always accessible to current group members.

### **Communication**

Principle #1: We will strive for transparency in decision-making and communication.

Principle #2: We will strive to disseminate our work as widely as possible, and we will strive to reflect the interdisciplinary nature of our work in the way we disseminate it.

Principle #3: We will strive to produce open source code & style sheets whenever possible

**Simulated Environment for Theatre: Research Project Charter – DRAFT 2**

Adapted from charters by Stan Ruecker and Paul Hjartarson

DATE: 4 October 2012

Principle	Policies
<b>Research Team Collaboration</b>	
<p>We will work collaboratively, because we believe that our collaborative efforts are greater than the sum of their parts.</p>	<p>We will strive for a model of integrated collaboration (as distinct from principal/incidental hierarchy or turn-taking). We look forward to articulating the model as we proceed.</p> <p>All contributors (full researchers, research associates, and research assistants) are team members.</p> <p>Team members will be invited based on their relevant research and technical expertise.</p> <p>We will strive to keep our administrative structure as simple and as “horizontal” (that is, as non-hierarchical) as the needs of the project permit.</p> <p>We will strive for transparency in decision-making and communication.</p> <p>We will strive to keep project administration as malleable and flexible as possible to enable us to respond effectively and efficiently to the many changes development brings.</p>
<p>We strive to describe team members’ roles according to their substantive contributions to the project.</p>	<p>Team roles are typically defined as follows (but remain flexible and available for discussion).</p> <ul style="list-style-type: none"> <li>• <b>Principal Investigator:</b> Administrative and conceptual lead for the purposes of individual funding proposals and grants. Usually a faculty member or eligible member of an accredited institution. No financial compensation, except in the case of commercialization of research results.</li> <li>• <b>Researcher:</b> Co-applicant on grant proposals; long-term, independent conceptual, practical, and administrative contributor to the research project as a whole; leader of an area of core project activity; leads authorship of presentations and papers in his/her field(s) of expertise; contributes to authorship in other areas as requested by the team; responsible for administering sub-grants at home institution; responsible for recruiting and supervising Research Associates and Assistants in his/her field. Usually a faculty member or holder of a relevant terminal degree. No financial compensation, except in the case of commercialization of research results.</li> <li>• <b>Research Associate:</b> Developing an independent research and practical contribution to the project as a whole in association with project Researchers; long-term conceptual and practical contributor to the project; may lead authorship of presentations and papers in his/her area of expertise; may assist in training and/or supervising Research Assistants in his/her field. Usually holds a relevant advanced degree. May</li> </ul>

	<p>receive financial compensation, as well as fees and/or royalties related to commercialization of research results.</p> <ul style="list-style-type: none"> <li>• Research Assistant: Performs research and/or practical tasks as assigned by Researchers and Research Associates. Usually enrolled in a relevant degree program. May receive financial compensation, as well as fees and/or royalties related to commercialization of research results.</li> </ul>
<p>We place a high priority on fostering the development of emerging scholars in all areas (including in the acquisition of collaborative skills).</p>	<p>All team members are invited to participate in conceptual design meetings. (Some administrative meetings are conducted in-camera among Researchers only.)</p> <p>Junior team members are encouraged to stay with the project in the long term, where possible, and to progress through its ranks.</p> <p>Junior team members are offered robust supervision (including iterative design processes and collaborative authorship).</p> <p>Junior team members will be funded to attend and present at project-related conferences whenever possible.</p>
<p>We wish to communicate in such a way as to preserve professional dignity.</p>	<p>We will strive to maintain a tone of mutual respect whenever we write or meet, and to forgive lapses if they occur.</p> <p>We will attempt to keep communications transparent, for example, by copying everyone involved in any given discussion, and by directly addressing with each other any questions or concerns that may arise.</p>
<p>We intend this work to move forward at a steady pace, given due awareness of the vagaries of life.</p>	<p>Project members will make every effort to attend meetings as arranged and to keep in regular contact by email or other electronic means. Frequent absence may result in being warned, then cautioned, then asked to leave the team.</p> <p>Project members will jointly establish and attempt to meet self-imposed deadlines, in part through providing the project administrator with lists of commitments, so that reminders will be sent out as a matter of routine.</p> <p>In the event that a task is overdue by a considerable amount of time (one that threatens to render the project's business unworkable), other members may at their discretion notify the offender that the task will be re-assigned, without prejudice to the constitution of the team or the public credit of any member.</p> <p>Project phases will be arranged so as to minimize the need for sequential completion of one phase before another can begin: wherever possible, phases will run in parallel, with communication occurring between people as they work on each phase, rather than waiting to communicate until the end.</p>
<p><b>Dissemination and Authorship Acknowledgment</b></p>	
<p>We would like our project to be documented for our own and future researchers' reference and benefit, and to assist with future funding opportunities.</p>	<p>Documentation is meant as a support; therefore, documentation responsibilities will be kept to a minimum amount possible (so that the work can be done) while ensuring that a sense of the project's development is recorded (so we can see where the project has been).</p>

	<p>We will document our work as it arises from the rhythms of the project. Forms of documentation include meeting notes; development “tickets”; white papers; copies of presentations; publications, and course materials developed; and so on.</p> <p>A task is not completed until the documentation is shared.</p> <p>All documents, including working documents, generated by the group are always accessible to current group members.</p> <p>In addition to PDFs or other formats for presentation, project members will keep safe and distribute regularly all native files generated for the project: source code, Photoshop, Illustrator, Flash, InDesign, and any other data files or source files. These files will be unflattened and editable. Where copyright restrictions do not apply, fonts should also be included in shared files.</p> <p>Insofar as ethics clearances allow, data backup will be provided through central project servers. Local projects should also make provisions for regular backup of all project files, including versions of files in progress.</p>
<p>We are interested in disseminating the results of this project as widely as possible, in a manner that reflects the interdisciplinary nature of our work, with credit to all contributors.</p>	<p>All team members are credited as authors of all project products.</p> <p>The SET system itself is authored by PI (or PIs, when more than one grant is current); Researchers and Research Associates (alphabetically) with Research Assistants (alphabetically).</p> <p>White Paper, Presentation, and Publication authorship contributions fall into the following categories:</p> <ul style="list-style-type: none"> <li>• Lead Author: responsible for the bulk of the conceptualization, research, and drafting of the research product. There may be more than one Lead Author of a paper.</li> <li>• Co-Author: responsible for a secondary contribution to conceptualization, research, and drafting of the research product; for example: preparation of figures, drafting short passages of text, design and/or implementation of the element of the project under discussion.</li> <li>• Contributing Author: responsible for collaborative foundational project work and, optionally, comments on and/or minor edits to the research product.</li> <li>• Research Assistants: follow the above after the word “with”.</li> <li>• Corporate Author: under certain circumstances - for example, when a disciplinary journal cannot accommodate a full list of authors, or where “spin-off” research (see below) is being published – a corporate author may be cited as follows: the Simulated Environment for Theatre project.</li> <li>• Sequence is normally: Lead (alphabetical); Co (alphabetical); Contributing (alphabetical); “with” Research Assistants.</li> </ul> <p>Project members may use any of our work as examples in presentations, papers, interviews, and other media opportunities. They may post any of it to their web sites. Wherever possible, they should</p>

	<p>mention the names of the other project members who were directly involved, as well as the name of the project.</p> <p>The project team will maintain a collaborative project web site, which will contain links to all the presentations and publications of the group. All participants will be listed on the project website, including dates and roles; the website provides an ongoing record of contributors and contributions.</p> <p>Any member can elect at any time not to be listed as an author, but may not veto publication.</p> <p>Team members should discuss possible publication venues before submitting abstracts or articles.</p>
Our open-source research products	?
<b>Funding and Compensation</b>	
The normal Tri-Council policies apply to our financial compensation structure.	Faculty in accredited institutions are not eligible for compensation, except in the case of commercialization of research products. Professional consultants, technical assistants, research associates, and research assistants are eligible for compensation, according to the guidelines articulated at administering institutions.
We would prefer for this work to be funded.	<p>Project members will watch for and notify each other of funding opportunities and participate wherever possible in the writing of appropriate grant proposals.</p> <p>Project members will assist in record-keeping and reporting the use of funds as appropriate.</p>
We will strive for equitable distribution of research funds to all contributing researchers.	<p>Researchers will be consulted about the appropriate distribution of funds.</p> <p>Funds will be distributed based on the tasks to be completed under each researcher's supervision.</p> <p>Consideration will be given to meaningful funding (for tenure and promotion purposes) at each institution.</p>
Commercialization	<p>Members will also watch for and notify each other of opportunities for commercialization and licensing.</p> <p>Any commercial agreements or plans will be made so as to include and appropriately benefit all members of the group (even members who are no longer active at the time of commercialization).</p> <p>We may consider a model whereby proceeds of commercialization are folded back into the project budget and/or the research budgets of individual faculty project researchers and research associates.</p>



Signature

Name

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