Collaborative Project Management (CoPM) Institute

Evaluation Report

Prepared by Laura Huerta Migus

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Introduction

This report summarizes the evaluation outcomes of the *Collaborative Project Management (CoPM) Institute* project, a two-day convening centered on bringing proven project management skills and approaches in the for-profit world to the informal science education (ISE) community to support effective collaborations and successful outcomes. The CoPM Institute was conceptualized as a pilot effort to test the effectiveness of porting of tools and frameworks for collaborative project management from the business/for-profit environment to advance the following project goals:

1. Build the capacity of ISIs and their partners to gain critical alignment on their work and plans, through use of evidence-based collaborative project-management practices to manage complex partnership efforts.
2. Strengthen communications between organizations with the common purpose of broadening participation in STEM.
3. Explore some of the core dimensions of culture to understand audience and institutional differences.
4. Maximize strategic impact through a post-institute virtual mentorship session for each team and use of an online Collaborative Project Management Playbook.

Participants at the convening were selected through a team application process. Applications were reviewed by the project team and selected to be as representative as possible of the ISE community (organization type, geography, project type, etc.) and of the spectrum of experience around collaborative project management (new to the practice to experienced). A total of 27 attendees representing 10 collaborative projects were selected and attended the institute.

Methodology

This evaluation data is drawn from two primary sources:

- A post-institute survey (Appendix A), disseminated to all attendees (n=21)
- Reflections from the project team (Appendix B) on four post-institute virtual mentorship sessions.

Participant Profile

 The *CoPM Institute* was conceived as an intervention to support collaborative program management between ISE practitioners who are working across organizational environments within the ISE landscape, such as museum-university collaborations, university-community based organizations, etc. Participants to the *CoPM Institute* were selected to represent a variety of cross-sector collaborations to test the viability of the approaches and tools developed as part of the project. While the majority of participants were employed at informal science learning institutions (59%, n=13), participants also represented institutions of higher education (27%, n=6), community-based organizations (4.5%, n=1), and independent research and evaluation firms (9%, n=2).

In acknowledgement of the important role that leadership plays in any collaboration, the *CoPM Institute* project team also vetted applicant teams according to the ability of each team's Principal Investigator (PI) or Co-Principal Investigator (Co-PI) to attend the in-person institute. Ultimately, all attending teams had either a PI or Co-PI represented at the institute, with half of respondents (n=11) to the post-institute survey identifying themselves as either the PI or Co-PI of their respective projects. Overall, participants also represented a diversity of tenure in their current positions, with all currently holding a mid- to senior-level management position. The tenure distribution shows that the majority of attendees had held their current positions for less than five years, which may indicate less project management experience and more need for the type of support offered by the *CoPM Institute* approach and tools.

Figure 1: Participant Tenure
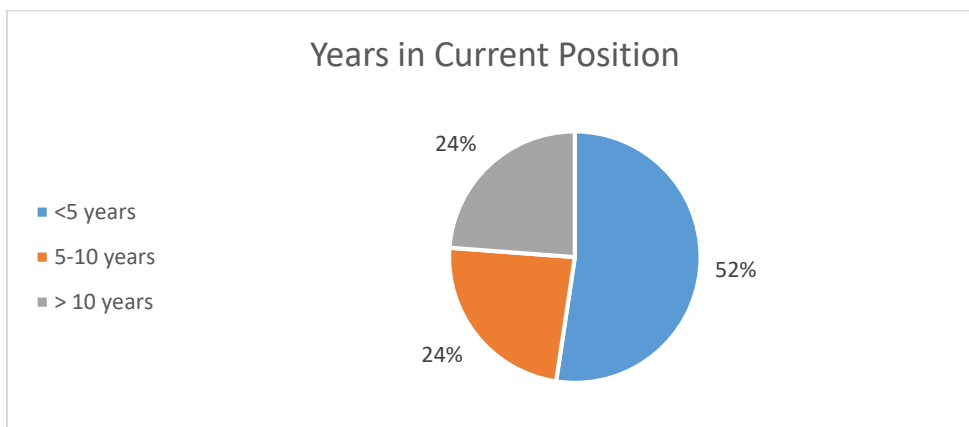
CoPM Institute Experience

Overall, participants rated their experience in the Institute positively, with 90% of respondents indicating high satisfaction (n=18) and 10% indicating moderate satisfaction (n=2). Participants were also asked to reflect on the extent to which the Institute increased their awareness of and ability to implement the core content areas covered by the workshop: how to use evidence-based practices to manage complex partnership efforts; strategies for strengthening

communication between partner organizations; and recognizing different cultural perspectives in order to broaden participation of the intended audiences for their project. The overwhelming majority of participants indicated that the institute positively impacted their understanding and ability to act in these areas. An analysis of open-ended responses to this question identified three categories of positive impact for participants: access to new tools, new insights on communications, and new paradigms for partnership and relationship development. As one participant noted,

> *I was introduced to a variety of tools for managing complex projects.   I was introduced to communication strategies and tools and practiced using them with project partners. This practice and the workshop's face-to-face communication enhanced our mutual understanding and communication skills.*

A second participant quote illustrates the value of attending the Institute with their team members:

> *This Institute provided the insight that, even though my partners and I enjoy very collegial relationships with one another, we have been assuming we have shared understandings/expectations about how we approach our work, and should probably address aspects of our project more directly to improve our productivity and likelihood for success. I value the tools presented during the CoPM Institute - these worksheets/activities were helpful because they provided structure for thinking through important conversations to have with partners (e.g. about personal styles and preferences, or about perceived project risks) and also provided a tangible tool to allow me to carry out those conversations immediately.*

It is only in the last area around cultural perspectives where there was a significant response (30%, n=6) from participants that the Institute content was not effective, although the majority did rate it highly. Improvements for this area of content are identified in attendee comments:

> *I thought the sessions on diversity were interesting and useful for me as a team leader - but I am still struggling with how to bring that work to our larger team successfully (in a way that team members feel safe) - and what to do about miss-matches of perspective due to issues of diversity... understanding in of itself is good for teams but how do we negotiate difference in a practical and thoughtful way? I think case examples would have been helpful.*

Negative responses also reflected a level of pre-existing proficiency in the areas of cultural differences, which meant the content may not have offered new learning for some participants:

> *We have intentionally engaged in critical dialogue about equity and inclusion within the context of how we design our program and how we choose to*

interact/collaborate with each other. The tools did not present anything new for us nor did it critically challenge our thinking about equity and inclusion.

However, for the majority of attendees (70%), this content was rated as highly valuable and as new learning:

I think our team does a pretty good job engaging girls in STEM from diverse backgrounds. However, I really liked the Diversity Wheel as a reminder of the complexity each person carries. As we discarded our cards, it reminded me that we cannot forget the multi-dimensional person.

Impact of the Institute

Immediate Impacts

Participants were asked to reflect on what part(s) of the Institute, with a specific focus on the steps in the collaboration process, were most impactful to their learning. All respondents were able to identify at least one positive impact of the institute, generally around access to new tools (communication, planning, cultural awareness) and the chance for teams that generally are working virtually or in a distributed environment, to work together in-person.

Planning and Communication Tools

When reflecting on what part of the Institute experience was most impactful for themselves, fifty percent (n=11) of respondents identified learning new tools and processes to improve and organize communication and project roles as most impactful. Responses range from general gratitude for learning about and getting to practice new processes and tools to identification of specific tools. The tools most frequently identified by name were the RACID and Project on a Page (PoP).

In-person Team Time

A significant number of respondents (18%, n=4) expressed that the opportunity to have uninterrupted, in-person time as a team to reflect on their project, roles, and processes was the most valuable part of their experience. Participant responses in this area also noted the value of sharing the learning space with other teams, which enriched their own team's learning and discussions during the Institute.

Cultural Awareness

Two respondents (9%) identified the content concerning cultural awareness as the most impactful for their experience. These respondents identified the Diversity Wheel exercise explicitly in their responses as most useful.

When asked to reflect on which insights and/or tools are of the highest priority for participants to take back for use in their projects, respondents identified six priority areas of action:

- Commitment to more pre-project planning
- Clarity and agreement on team communications processes
- Clarity on roles and timelines
- Ensuring shared understanding of goals
- Focus on risk assessment for project outcomes

The most frequently identified priorities were clarity on roles and timelines (45%, n=10) and agreement on communication processes (27%, n=6). Analysis of open-ended responses showed that two of the tools were named with high frequency for advancing this work – the operating agreements guidance and the PoP.

Suggested Improvements to the Institute

While participants rated the Institute and its content very positively, there were a number of suggested improvements (n=10) identified in the post-institute survey. The most frequent suggestion for improvement from respondents was for more time to deeply engage with the material and process within and between teams in the institute (n=5). Responses in this category also suggest that the time allotted for the learning was too short and, in some cases fatiguing.

> *It was a lot of information to absorb and process in 2 days. Focus on a fewer ideas,*
> *go deeper, and practice more. Come out with one specific goal and action plan to*
> *apply it to your project.*

Other suggestions for improvement of the Institute included better integration and focus on Broadening Participation content throughout the Institute (n=2), and integration of examples of successes and challenges from the ISE context, rather than the corporate context (n=2).

Utility of the Playbook

A core product of the *CoPM Institute* was the development of the central text for the Institute, the CoPM Playbook – a compilation of exercises, templates and guidance on collaborative project management. The Institute agenda was organized as a hands-on practicum of the tools and frameworks contained in the Playbook. When asked to share how they might envision using the Playbook beyond the Institute, all respondents (n=22) were able to articulate ways in which they would use the Playbook with their project team, even those not present at the Institute. As one participant noted:

> *We will use the tools to engage all of the partners to better understand how we can*
> *work better together for a more successful project.*

In addition, a significant number of participants (22%, n=4) stated that they intend to use the insights gained and Playbook tools and philosophies with projects outside of the project they came to the Institute representing:

> *I believe we will revisit each of these steps at various times in our project. Moreover, I will use these tools to help organize collaboration in other projects. And if not the tools themselves, the way of thinking.*

Post-Institute Virtual Mentoring

As part of the follow-up to the Institute, and to gain additional insights on the effectiveness of the Institute and Playbook, the project team offered one one-hour virtual mentoring session to all project teams that participated in the Institute. Four teams participated in these sessions. These unstructured conversations allowed for each team to bring current challenges facing their projects to the project team. While these calls varied in focus, analysis of the project team reflections and notes indicates that nearly half of Institute participant teams still required post-institute support on how to select and leverage the Playbook tools to address their challenges. The need for post-institute mentoring is an area of evaluation for the project team in future efforts.

Conclusion

In general, participant feedback on the *CoPM Institute* experience was overwhelmingly positive, with the institute experience and content rated highly by participants across varying levels of professional experience and position. Participants were able to clearly articulate new areas of learning for improving cross-organizational collaborations, especially with respect to communications processes and project roles and timelines. Areas of improvement were also identified by participants, including revisiting the time allotment for the Institute to better support learning, better integrating cultural awareness content throughout the Institute content, and tailoring case examples in the institute to reflect the ISE environment rather than the corporate environment. Post-Institute virtual mentoring sessions were also useful in highlighting the need for additional support for some participating teams to envision how to leverage the tools offered to address new challenges. Overall, participant feedback indicates that the *CoPM Institute* experience and tools, as a pilot effort, helped participants gain critical alignment on their work and plans, strengthen communications between organizations with the common purpose of broadening participation in STEM, and explore core dimensions of culture to understand audience and institutional differences. An area for further exploration and reflection is the sustainability, utility, and value of post-Institute mentoring for future efforts.

Appendix A: Post Institute Survey Instrument

We ask that you take a few minutes to provide feedback about your experience at the Collaborative Project Management (CoPM) Institute. The information you provide will help us better understand your needs and continue to provide the resources and support that will assist you in the upcoming year. Thank you!

Organizational Profile

1. Please select the organizational type that best describes your institution
   - ☐ Informal Science Institution
   - ☐ Institute of Higher Education
   - ☐ Community Based Organization
   - ☐ Other_____

2. What is your role in the project? Please check all that apply.
   - ☐ PI
   - ☐ Co-PI
   - ☐ Fiscal Agent
   - ☐ Program Delivery
   - ☐ Executive Administration or Management
   - ☐ Community Partner
   - ☐ Education
   - ☐ Exhibition
   - ☐ Youth Development
   - ☐ Public relations
   - ☐ Proposal Development
   - ☐ Research
   - ☐ Evaluation
   - ☐ Consulting
   - ☐ Other_____

3. What is your current job title?

4. Approximately how many years have you worked in that capacity?

5. Please tell us about the area of expertise you bring to the project.

Your Experience of the CoPM Institute - The following questions are to help us understand your experience as a participant in the CoPM Institute.

6. Overall, how satisfied are you with your experience of the CoPM Institute?
   - ☐ Very Satisfied
   - ☐ Satisfied
   - ☐ Moderately Satisfied
   - ☐ Not at all Satisfied

7. Rate the extent to which you agree with the following statements (ranked Strongly Agree, Agree, Disagree, and Strongly Disagree):
   a. I have increased my understanding of how to use evidence-based management practices to manage complex partnership effort(s)
   b. I have increased my understanding of communication strategies I can employ to strengthen communication between my organization and our partners
   c. I have gained/deepened my understanding of the importance of recognizing

different cultural perspectives in order to broaden participation of the audiences my collaborative project aspires to serve

    d. With respect to the three questions above, please provide examples of what kinds of insights you may have gained.

8. What is the highest priority you will take back to use for your project?

9. Please describe what impacted you the most from this Institute. Which steps in the collaboration process were most helpful?

10. If you could change one thing about the CoPM Institute, what would it be?

11. Please share how you think the CoPM Institute playbook will be useful to you. If you do not think it will be useful please indicate why.

12. Please indicate below your interest in a follow-up virtual mentorship session with one of the Institute facilitators.

13. What is the highest priority you will take back to use for your project?

14. What existing and new strategies will you include in your project that you have learned from or deepened your knowledge of from this Institute?

15. Please add any additional comments related to the project management challenges and benefits inherent in research-and-implementation types of projects.

Demographics - Given the project's commitment to equity and diverse representation, we would like to document the demographic make-up of the participant group.

16. What is your gender?
- ☐ Female
- ☐ Male
- ☐ Other

17. Please select your racial or ethnic identity(ies). (Check all that apply.)
- ☐ African American
- ☐ Afro Caribbean
- ☐ Hispanic or Latino, White
- ☐ Hispanic or Latino, Non-White
- ☐ Asian American
- ☐ Pacific Islander
- ☐ Native American
- ☐ White or Caucasian
- ☐ Other (please specify)

18. Please check your age group
- ☐ 18-25
- ☐ 26-35
- ☐ 36-45
- ☐ 45-55
- ☐ 56-65
- ☐ 66+

Appendix B: Post-Institute Mentorship Session Notes

Team 1:

They noted that they had started to use the CoPM principles on their other projects. One key member of staff is leaving and they will use the tools to help onboard a new member of staff. They are using the PoP as an internal communication tool.

Team 2:

Their project brought together a very diverse and large group of researchers, practitioners, and community organizers with a nationwide team and city-based teams. They were having difficulty running the zoom calls and having everyone understand where they fit in the overall picture of the project. There were also a lot of staff changes that meant not everyone had the same degree of knowledge about the project. Cinda discussed operating agreements, team maps, and establishing personal values and styles. The stakeholder assessment helps you to get to know what your team cares about and what makes them feel less safe. Establishing trust would help with the complex project.

Team 3:

We talked about their project and how to bridge researchers with community groups. Conversations with the community groups around the STEM component of programs and the availability of money and resources. Cinda recommended bringing on the community member as a part of the core team and a discussion to create common ground. Perhaps use college students as the bridge between the researchers and the community group leaders. Engage the parents. Use the advisory board.

Team 4:

Judy and I talked to just one member of the team who wanted to pick Judy's brains about applying for an NIH SEPA grant. In addition to great practical advice about the grant and partners etc., Judy talked through how the Playbook could be used as a planning tool to help lay out the components of the work and develop the proposal.