



**Project Historian
Mid-Term Report**

Project Name:
**Technology
Integration
Program (T.I.P.)**

Project Manager:
Erin Cunia
Team Members:
Byeungseob Choi,
Joanne Harlow, Audrey
McNally, Rhonda Reader

Weeks	Summary of Activity	Meetings
Wk. 1 1/18/15- 1/23/05	<p><u>Introductions and Course Overview</u> Students introduced themselves on a group discussion board, submitted personal information forms, and familiarized themselves with both Blackboard and the IDE 671 course guide.</p>	Meetings: None
Wk. 2 1/24/05- 1/30/05	<p><u>Team Formation</u> Approximately one-half of the class met for a face-to-face meeting on 1/24/05. The following day group assignments were posted on the course Web site. After several e-mails were exchanged, Group Four met for the first time on 1/30/05 with 3 of the 5 members in attendance. Audrey McNally volunteered to become the project historian and Erin Cunia was unanimously chosen as Project Manager. The name "Team Quatro" was agreed upon (because we were originally called "Group Four"). The team members took an inventory of abilities, established operating principles, and created a list of tasks, assigning a writer and editor for each assignment on a rotational schedule. The Team Formation deliverable was posted that evening and was later amended to include information for all team members.</p>	Meetings: Optional Face-to-Face for Whole class: 1/24/05 5:30-7:00 PM Huntington Hall Team Organizational Meeting: 1/30/05 3:00-5:00 PM Bird Library
Wk. 3 1/31/05- 2/6/05	<p><u>Project Planning</u> During the online discussions this week, Team Quatro struggled to understand the difference between the <i>proposal</i> (having to do with technology integration in a K-12 school) and the <i>project</i> (researching and writing a grant <i>proposal</i>). After consulting the course guidelines and sample deliverables from prior years, we were able to define our group project as: "the development of a proposal idea, the research and selection of a government agency or private foundation that would fund the proposal, and the completion of a grant application in response to an RFP (request for proposal)". The <i>project</i> overview, we decided, did not need to deal in specifics as to what the <i>proposal</i> would be, inasmuch as the</p>	Online Meetings: 1/31/05 Project Overview Discussions 7:30-8:30 PM (no archive) & 9:30-10:30 PM (archive) 2/1/05 Project Overview Follow-up Discussion 10:30-11:30 PM (no archive) Team Meeting in Bird Library: 2/3/05 "Deliverables" Discussion 5:30-700 PM

<p>Wk. 3 (cont.)</p>	<p>development of the proposal itself would be part of the project planning and implementation phases. The face-to-face meeting held on 2/3/05 dealt with the pressing issue of the three deliverables due on Monday 2/7/05. At this meeting two of the deliverables, the Project Network and the Critical Path, were determined to be similar in format/content and were thus reassigned to <i>one</i> team member instead of <i>two</i>. Also, because of our team's failure to check the course bulletin board prior to the meeting (where a Work Breakdown Structure draft was already posted), the third deliverable was also reassigned to a different team member. This was a regrettable oversight, but one which was well-intended to take the pressure off a temporarily absent team member.</p>	
<p>Wk. 4 2/7/05- 2/13/05</p>	<p>Project Planning This week Team Quatro was again challenged with a short deadline as well as with several other issues that, taken collectively, would contribute to what was probably our "storming" week.</p> <p>Unfamiliarity and/or technical problems with the Blackboard chat/virtual classroom feature impeded discussion and probably lengthened the time spent in online meetings. One team member could read the screen, but was unable to enter comments. Another was repeatedly bounced out of the chat room when leaving the screen to search for documents or web pages. Despite this, our team continues to use the Blackboard team collaboration area because of its accessibility to all and its capability for posting archives of our meetings.</p> <p>The team was also challenged by the natural tension created by author vs. editor roles (i.e., who determines and makes final changes) and the prospect of posting deliverables "late" (even by one day). The language barriers inherent for our international student (even one who majored in English studies) posed an additional consideration, as the rest of us sought to avoid the use of unclear language.</p> <p>Erin Cunia, our project manager, shared a "blog" entry created for another class on the subject of teamwork, in which she expressed her current frustration in her project manager position. In it she outlined her expectations for our team and her confidence that we will be successful.</p> <p>The obstacles posed by the demands upon team members' time and availability had to be</p>	<p>Online Meetings:</p> <p>2/7/05 "Deliverables" Discussions 7:30-8:30 PM (no archive) & 9:30-10:00 PM (archive)</p> <p>2/08/05 Project Network & Critical Path Follow-up 8:00-8:30 PM (archive)</p> <p>2/13/05 Discussion on 2/14 "Deliverables" and Grant/Proposal Ideas 7:30-9:00 PM (archive)</p> <p>Team Meeting in Bird Library: 2/10/05 "Deliverables" Discussion</p>

<p>Wk. 4 (cont.)</p>	<p>acknowledged and dealt with. Our first meeting at which every team member was present was the online chat on 2/13/05. Despite this fact, everyone on the team demonstrates a high level of interest in the project and commitment to the team effort.</p> <p>Team Quatro sought and received clarification on the potential sources of grant funding (federal, state, corporate, or foundation). The team decided not to rule out any type of sponsor at this point and to individually research and select at least one proposal (program) idea and one funding source that would support it before the next meeting.</p>	
<p>Wk. 5 2/14/05- 2/20/05</p>	<p>Project Planning</p> <p>Team Quatro members were pleased to post their four deliverables by the February 14th deadline, due in large part to the intensity and frequency of last week's interactions.</p> <p>This week's focus was the development of a grant proposal idea and the selection of a funding source. Team Quatro members met online on Tuesday, Thursday, and Sunday evenings to suggest, consider, and narrow the range of choices for grant proposal ideas and grant funding sources.</p> <p>Online research tended to be tedious and frustrating when trying to share websites through the Blackboard chat area. This necessary task was better performed through team members' individual efforts which were later shared in team meetings.</p> <p>Some confusion appeared in regard to our understanding of "Is this a real grant application?" vs. "Are we making this up?". There appeared to be a movement toward "real need" as being easier to document and justify.</p> <p>Some concern was raised about proposal deadlines having passed on some of the RFP's. This roadblock was not regarded as insurmountable in that many grants are awarded annually and that our application, <i>if actually used</i>, would be early for next year's selection process.</p> <p>Team Quatro agreed upon the idea of proposing to purchase and implement WebCT in a middle or high school environment in order to increase parent involvement and improve student performance in the areas of math, science, and technology.</p> <p>A variety of funding sources for this proposal were considered. Several prospective funders were</p>	<p>Online Meetings:</p> <p>2/15/05 Discussion on Grant/Proposal Ideas 7:30-9:00 PM (archive)</p> <p>2/17/05 Discussion on Grant/Proposal Ideas 7:45-8:45 PM (archive)</p> <p>2/20/05 Grant Proposal Funding Source Selection 7:30-9:00 PM (archive)</p>

<p>Wk. 5 (cont.)</p>	<p>eliminated because of their relatively low dollar limits or restrictions on the availability and use of funds. After consideration was given to the National Science Foundation, Coca-Cola, Corning, and Toshiba, Team Quatro agreed to apply for the NYS Learning Technology Grant for Enhancing Teaching and Learning, which is linked to the NYS Math, Science, and Technology Learning Standards and which has a budget of up to \$50,000. for a one-year project.</p> <p>The team agreed that the research, writing, and editing of the grant proposal would be a major undertaking that would be shared equally among the team members. In preparation for the 2/27/05 online meeting, the project manager will look at the parts of the grant application and make task assignments to individuals.</p>	
<p>Wk. 6 2/21/05- 2/27/05</p>	<p>Project Implementation Audrey McNally, Team Quatro Project Historian, met with Christina Walker and Linda Kurdziel, project historians for Teams FIX and F.I.T.T., to discuss the role of the project historian and possible formats for the historian's reports.</p> <p>An online Team Quatro meeting is scheduled for 2/27/05 to discuss the grant/proposal research, development, and writing.</p>	<p>Project Historian Meeting in Huntington Hall: 2/22/05 12-1 PM Mid-term Report Discussion</p> <p>Online Meeting: 2/27/05 Grant Proposal Assignments 7:30 PM</p>

<p align="center">Project Management Theory vs. Reality</p>	
<p align="center"><u>Theory</u> Best Practices from "The Discipline of Virtual Teams" by Jon R. Katzenbach and Douglas K. Smith</p>	<p align="center"><u>Reality</u> Actual Practices from Team Quatro 1/25/05-2/27/05</p>
<p><u>Team formation</u> <i>Convene a face-to-face meeting early on.</i></p> <p>Katzenbach and Smith recommend this type of contact for setting purpose and goals, establishing ground rules, and getting to know one another.</p>	<p>After 1/25/05, when team assignments were posted, members of what was then called Group Four exchanged several e-mail messages and telephone calls to hastily arrange a face-to-face meeting for 1/30/05, the day on which the team formation document was due. Because one member of the team was out of town (which the team knew about in advance) and another had not checked in as yet, the three remaining members met in Bird Library to begin our work.</p>

<p><i>Make conscious choices about disciplines.</i></p> <p>Katzenbach and Smith differentiate between "single-leader" and "team" disciplines, used for individual vs. collective work products. All groups require both disciplines in order to succeed and must learn when to apply each.</p>	<p>At our initial meeting (held at 3 PM), the team was primarily concerned with making the midnight deadline for the team formation document. With two members absent, we pressed forward to choose a project manager and historian, name the team, inventory abilities, establish operating principles, and create and assign tasks. All of this was done in an expedient manner. It is difficult to say what might have been different had our two missing members had a voice. We did what we had to do under the circumstances, with little attention given to single-leader vs. team disciplines.</p>
<p>Project Planning</p> <p><i>Match member skills and perspectives to collective work products.</i></p> <p>The authors suggest assigning task and leadership roles in ways that utilize the members' skills, experiences, and perspectives.</p>	<p>Team Quatro was partially successful in this regard. In terms of leadership roles, Audrey volunteered to become project historian because of her undergraduate concentration in English and her skill with writing. Although Byeungseob had been a project manager in Korea, he felt that his facility with English (however great it seemed to the rest of us) would hinder his ability to lead a group. Erin, as an information technology specialist and a retail <i>and</i> project manager, proved an excellent choice. We <i>did</i> inventory member's abilities for our team formation document, but when it came to assigning authors and editors for the tasks we had listed, we set up a simple rotation beginning with the names of those who were present. Being as yet uninformed in the formal discipline of project management, we did not know much about what type of expertise the listed tasks required. As we enter the phase of project implementation (the writing of the grant), we will be better able to match member skills and perspectives to the various parts of the grant application.</p>
<p><i>Hold face-to-face sessions as often as needed.</i></p> <p>Katzenbach and Smith favor face-to-face meetings for intensive, real-time problem-solving and virtual meetings for efficient information sharing and updating. Some virtual groups require few in-person sessions beyond the initial contact.</p>	<p>Team Quatro has held three face-to-face meetings, none of which were attended by everyone. Given the demands of our members' work and family commitments, and the relative convenience of meeting on-line, our project manager took the necessary route of setting up frequent, scheduled (2-3 times per week) virtual chats using the Blackboard collaboration area. Our PM Erin's expertise with information technologies has been a great help in making</p>

	<p>this forum both accessible and archivable. Although we have had some technical difficulties (due as much to our own inexperience as to Blackboard's quirks), we are mostly satisfied with the outcomes of our virtual sessions.</p>
<p>Project Implementation <i>Consciously shift and share leadership roles.</i></p> <p>The authors believe that virtual work requires more leadership than co-located work and that the roles of facilitator, note-keeper, and discussion leader should not be overlooked.</p>	<p>One way in which Team Quatro has shared leadership roles is in the authoring and editing of deliverables. Everyone contributes to the individual creation and the collaborative revision of our process documents. Although we have not formally assigned roles in on-line sessions, Erin (PM) capably leads the discussion and Audrey (Historian) keeps notes of all meetings. Erin also facilitates group decision-making by asking each person to state his/her opinion or agreement on critical issues.</p>
<p><i>Pick and practice groupware features together.</i></p> <p>Katzenbach and Smith advise that virtual teams work together to select groupware and to practice using it.</p>	<p>Given the many features that Blackboard provides for group interaction, including file shares, private discussion boards, e-mail, and chat rooms, Team Quatro has not really considered alternative groupware. The frequency of our virtual sessions and group postings is providing everyone with a lot of practice.</p>
<p><i>Agree on your own netiquette.</i></p> <p>Another "best practice", according to the authors, is for a team to develop explicit expectations about how electronic networking will facilitate interactions.</p>	<p>Team Quatro's network etiquette is more implicit than explicit. So far, everyone has been prompt (as much as possible), cordial, respectful, and goal-oriented. We frequently open and close our on-line sessions with chit-chat (necessary for team-building), but mostly stay on task during the core of the discussion. Occasionally, when the conversation gets side-tracked, Joanne (an educational administrator with a lot of insight) does an excellent job of getting us re-focused with an appropriate question. Rhonda has fallen naturally into the role of feedback-provider and cheerleader with frequent postings to the group discussion boards. Byeungseob's humor, frankness, and willingness are a welcome addition to the team. As long as our team's networking continues to be successful, we will continue to operate with implicit "netiquette".</p>

Reference:

Katzenbach, Jon R., and Douglas K. Smith. "The Discipline of Virtual Teams." *Leader to Leader*, 22 (Fall 2001): 16-25.

Prepared by: Audrey McNally Revision #1: Audrey McNally	Date: 2/25/05 2/27/05	Approved by:	Date:
--	------------------------------------	---------------------	--------------