Taming the Tangle: Project Management in Education Abroad

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Presenters

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Agenda

- Activity: Tower of Babel
- Approaching Project Management
- Case Study: Vanderbilt University Global Education Office
- Case Study: University of Minnesota Learning Abroad Center
Activity
Group Project: Tower of Babel Competition

**Context:** Your companies have been requested to present a scale model of a tower to three members of the client organization, ALABRI. The ALABRI representatives will circulate around the room to observe the process and outcome of each company. At the end of the build time, they will select the best tower presentation. The company with the winning presentation wins the job contract.

**Objective:**
Build a tower using only the paper and tape provided at your tables.

**Parameters you are given:**
- The tower should be as tall as possible
- The tower should be planned and built in no more than 8 minutes
- The tower should not be expensive (to use the fewest number of sheets)
- The tower should have an attractive design
Survey - Agree or Disagree?

1. I was focused on finding a good technical solution.
2. I did not think of the context or what the project will be used for.
3. I thought the information provided was sufficient.
4. I felt pressure to begin the “real work” and I got carried away.
5. I established my own assumptions to compensate for missing information.
6. I am pleased with our results.
7. We involved and collaborated with the client in our decision making process.

Discussion Questions:
What was it like to start this project with limited information?
What was your biggest obstacle?
Now that you know more about this project, would you do anything differently?
Project Management
Our Approach

- Many areas of knowledge
- Many available tools
- Many complicating factors
- Focus on identifying and achieving goals
- Case studies
Project Development: Some Questions to Ask

- What are we trying to do? What does this organization need?
- What currently exists to meet that need?
- What is our capacity? What constraints do we face?
- What is the most feasible solution?
- What is the scope of our project?
- What is required of this project? What do we need this project to achieve? What won’t this project achieve?
Should we DO anything?

1. Does it need a process/system? (Yes or No)
   - Yes: Create a Tech or System Project
   - No: Is there currently a way to do it? (Yes or No)
     - No: Is it the best way to do it? (Yes or No)
       - No: Is it good enough (for now)? (Yes or No)
         - No: End
         - Yes: End
     - Yes: End
Pick Two out of Three!
Case Study

Vanderbilt University Global Education Office
Vanderbilt University Global Education Office (GEO)

- Approximately 700 students abroad per year
- 11 full-time staff, 6-10 undergraduate and graduate student workers
- Unique Features:
  - Centralized office under the Provost
    - Serving 4 undergraduate colleges
  - 40% of students currently study abroad
    - Strong engineering representation (35% of VUSE class of 2017)
  - ~15% increase in spring participants from 2016 to 2017
GEO’s Problem

- Growing staff
- Increasing application numbers
- Isolated process knowledge
  - Difficulty delegating tasks
  - Duplicated effort
  - Lack of efficiency
- Complex process
- Lack of consistency
Application Cycle Considerations
The Tangle
GEO’s Solution

- Project management software: Asana
- Goals
  - Summarize complex process
  - Reproduce results
  - Improved stakeholder & internal communication
  - Address strategic problems
Using Project Management Software

**Application deadlines:**

- **Deadline: Spring Deadline 1**
  - Aug 14

- **Email: Follow up on Spring Deadline 1**
  - Aug 14

- **Withdraw incomplete Spring Deadline 1 applications**
  - Aug 21

- **Deadline: Spring Deadline 2**
  - Sep 4

- **Email: Follow up on Spring Deadline 2**
  - Sep 4

- **Withdraw incomplete Spring Deadline 2 applications**
  - Sep 6

- **Deadline: Spring Deadline 3**
  - Sep 10

- **Email: Follow up on Spring Deadline 3**
  - Sep 15

**Nominations: Spring Deadline 1**

Please mark the task assigned to you as done when you have completed all of your nominations.

Some nomination forms will require advisors to provide or check student-provided information on where transcripts should be sent. That contact is [provide job title rather than individual name where possible].

- **Aimee Lavatt**
  - International Curriculum and Credentials Analyst
  - Vanderbilt University
  - Office of the University Registrar
  - 110 21st Avenue South, Suite 110
  - Nashville, TN 37240-7701
  - Secure FAX: 615-343-7709
  - E-MAIL: studyabroadanalysis@vanderbilt.edu

- **Email: Send reminder to advisors about Spring Deadline 1 Nominations**
  - Aug 21

- **Nominate eligible students (Spring Deadline 1)**
  - Aug 22

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  - Aug 22

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  - Aug 22

- **Nominate eligible students (Spring Deadline 1)**
  - Aug 22
Remember the Tangle?
GEO’s Application Process
Additional Tools

- Conditional nomination email template.boxnote
  Updated May 22, 2017 by Ruth Page
  3 KB

- Ineligible - academic probation email template.boxnote
  Updated Feb 27, 2017 by Ruth Page
  3.8 KB

- Ineligible - disciplinary probation email template.boxnote
  Updated Sep 12, 2016 by Emma Buchanan
  3.3 KB

- Ineligible - GPA below 2.7 email template.boxnote
  Updated Sep 12, 2016 by Emma Buchanan
  3.7 KB

Application Requirements (Box: http://bit.ly/1Rr1LCl)

- Semester Pre-Decision
  - Pre-decision Elements Common to All Applications (Semester)
    - AGE
    - American University in Cairo
    - Boston University Dresden (Spring Only)
    - Budapest University of Technology and Economics
    - CASA
    - CET
    - CIEE

- Semester Post-Decision
  - Post-Decision Elements Common to All Applications (Semester)
    - AGE
    - American University in Cairo
    - Boston University Dresden (Spring Only)
    - Budapest University of Technology and Economics
    - CASA
    - CET
    - CIEE
    - CIEE
Assessment of Impact

- Ongoing development of processes
- Fulfillment of intent
- Improved efficiency and consistency of process
Lessons Learned

- Require a high level of detail
- Question assumed knowledge
- Expect an ongoing process
- Communicate, communicate, communicate!
Case Study

University of Minnesota Learning Abroad Center
University of Minnesota Learning Abroad Center (LAC)

- Approximately 4,000 Students abroad per year
- 40 full time staff in LAC, 6-10 student employees
- Unique features
  - Create and manage centers and programs abroad
  - In house registrar, finance, marketing and communications
  - Stand alone operation within the University
  - Self-funding - non-profit mentality
Using Basecamp PM Software as Workflow Tool

- Off the Shelf Option to manage Print Communications Requests
- Quick and reasonably easy to implement
- Saves lots of time for a variety of staff
- Technology Pieces;
  - Wordpress
  - BaseCamp
  - Adobe Acrobat
Moving from Paper to the Web...

Updated Communications Process

Watercooler → Basecamp → Acrobat Pro
Using **Basecamp** for communications projects

To initiate a project, find the **Communications Work Request** submission form on the **Watercooler**. (Documents>Communications>Communications Work Request form 2016.) Download it, fill it out, and email it to everyone on the communications team.

When a member of the communications team receives your request, they will open a new project in **Basecamp** and add you to the project team.

You will then receive an email to visit that project in Basecamp. The project will be labeled with a number and a title. For example, “**42 Rome Global Seminar Flyer**.”
Step 1
Click on the link in the email. Then sign into Basecamp using your X.500 and password.
Step 2
Here is the project page, on which you can see the latest project updates, discussions, to-do lists, and more.

Communications Work Request

- Invitations
- Add more people
- Invite more people

Latest project updates
- 12:26pm: You added a to-do: Request a new project
- 12:26pm: You added a to-do: Post an event
- 12:26pm: You added a to-do: Distribute brochures

See all updates

Discussions
- Post a new message

Emily N.
- Instructions: Please specify the following: *requested delivery date *quantity *size *paper color *full color or black and white
- 11:13pm

Brook B.
- Attach This: Can I attach something from the shared server drive to this and can you guys open it?
- Nov 20, 2015

Ilya K.
- Design to-dos: Hey peeps can you see this comment?
- Nov 20, 2015

To-do lists
- Add a to-do list

Work request management
- Assign serial number and rename the project
- Archive this project

Content to-dos
- Make edits
- Promote on social media
Step 3
If you have comments about the project or requests for additional project components from the communications team, you can post a discussion. To post a new discussion, click on “Post a new message.”
Then add a message subject and write a message. Pay particular attention to the bottom of the page—who to notify. I highly recommend you choose the second option and choose who receives the email. That way, staff won’t be receiving unnecessary Basecamp emails for project steps in which they’re not involved.
Step 4
Based on your requests, your discussion items, and the project needs, the communications team will add to-dos and assign them to specific people for specific dates. You may also be assigned to-dos—to review a proof, to send information on a specific program, etc.
Step 5
At the bottom of the page, you can also review files that have been uploaded or upload your own. (Ilya will discuss this step next.) This is where you will upload your project edits via a PDF you created in Adobe Acrobat Pro and where you will review a proof from the communications team.
Step 6
To see an overview of your projects, click on “Me” at the top of the page.

Here you can view your latest activity and your open to-dos.
Using **Adobe Acrobat Pro**
to add comments to a PDF document
If you don’t have **Adobe Acrobat Pro** installed on your computer, download it from the **Managed Software Center** (located in your programs dock).
Adobe Acrobat Pro should not be confused with Acrobat Reader

Adobe Acrobat Reader
(do not use)

Adobe Acrobat Pro
(use!)
Step 1
Locate your PDF file in Basecamp and **download** it.

Open the file using **Adobe Acrobat Pro**.

To add comments, go to the **"Comment"** tab in the upper right-hand corner.
The “Annotations” and “Drawing Markups” drop-down menus provide commenting options.
Step 2

Select the “add sticky note” comment option. (You can also use the highlight tool)
You can add notes (and highlight text)
Step 3

When you’re done, use “Save As” to save the PDF file as a version (V1, V2, V3, etc...).
Finishing it out...

- **Step 4**
  - Upload your PDF file to Basecamp. A commie will then start working on implementing the changes you have requested.
  - You will be notified when a finished version of your PDF has been uploaded to Basecamp, where you can review and approve it.
Student Document Management & Reporting

- Rolling admissions
- 20 people creating and managing programs
- 3 person program teams - de-silo’ed
- Process created 10 years ago driven by technology available and by legal requirements
- Volume - 40,000 student files per year
- Sustainable, probably - but very inefficient
Retain & Pipeline Management

There are 4 main ways to move students through our pipeline easier and faster:

- Reduce the amount students have to turn in
- Make what they have to turn in easier to understand
- Make it easier for them to turn it in
- Provide reminders at key points about what they have to do / turn in
**Solution** - NOT going to do a purely ‘off the shelf’ solution. We’ll build it - Semi-Custom

- Web based Reporting Center
- Data housed intelligently, updated automatically etc.
- Who needs to pay attention to what, brought to their home screen
- Fix student collection mechanisms
- Ability to share student data and reports with onsite staff
Student Process

1. Student is assigned item in checklist
2. Student logs in and downloads pdf
3. Student prints pdf
4. Student writes in data & signs form
5. Student uploads form to checklist
Staff Process

1. Find new documents uploaded by students the previous day.
2. Open each attachment and review info or forward to another staff member for review.
3. Flag incomplete info or info that should be followed up on.
4. Be in contact with student/have them re-submit pdf.
5. Download pdf from peoplesoft then upload to Google folder to share with onsite staff.
Technology Tools for the Build

Since we’re at a conference with Tech in the title...

- Drupal framework
- Tableau Analytics Software & Server
- PeopleSoft / Datawarehouse
- MySQL & University data store
- PHP/JavaScript/HTML/CSS...and probably some other fairy dust

...Drupal, Tableau, PeopleSoft all offer ‘off the shelf’ functionality that we’ll bring together & enhance -- semi-custom
Lessons Learned

- Off the Shelf, Semi-Custom, Full Custom Builds - all can have great impact
- Document, Document, Document - even though you don’t want to
- Over-communicate...with everyone. All of the time.
- Build -> Test -> Pilot -> Fix // Rinse, Repeat and get used to it!
Conclusion
What next?

- Take time to plan
  - Identify potential processes for project management
  - Identify existing resources
  - Experiment with software
  - Start with high-level outlines, then add detail
- Remain goal-focused
- Be patient!
Questions?
THANK YOU