

Taming the Tangle: Project Management in Education Abroad

Brook Blahnik, Isabelle Crist, Ruth Page



Presenters

Ruth Page

Coordinator, Institutional Relations
DIS: Study Abroad in Scandinavia

Isabelle Crist

Assistant Director, Global Education Office
Vanderbilt University

Brook Blahnik

Associate Director, Learning Abroad Center
University of Minnesota, Twin Cities

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

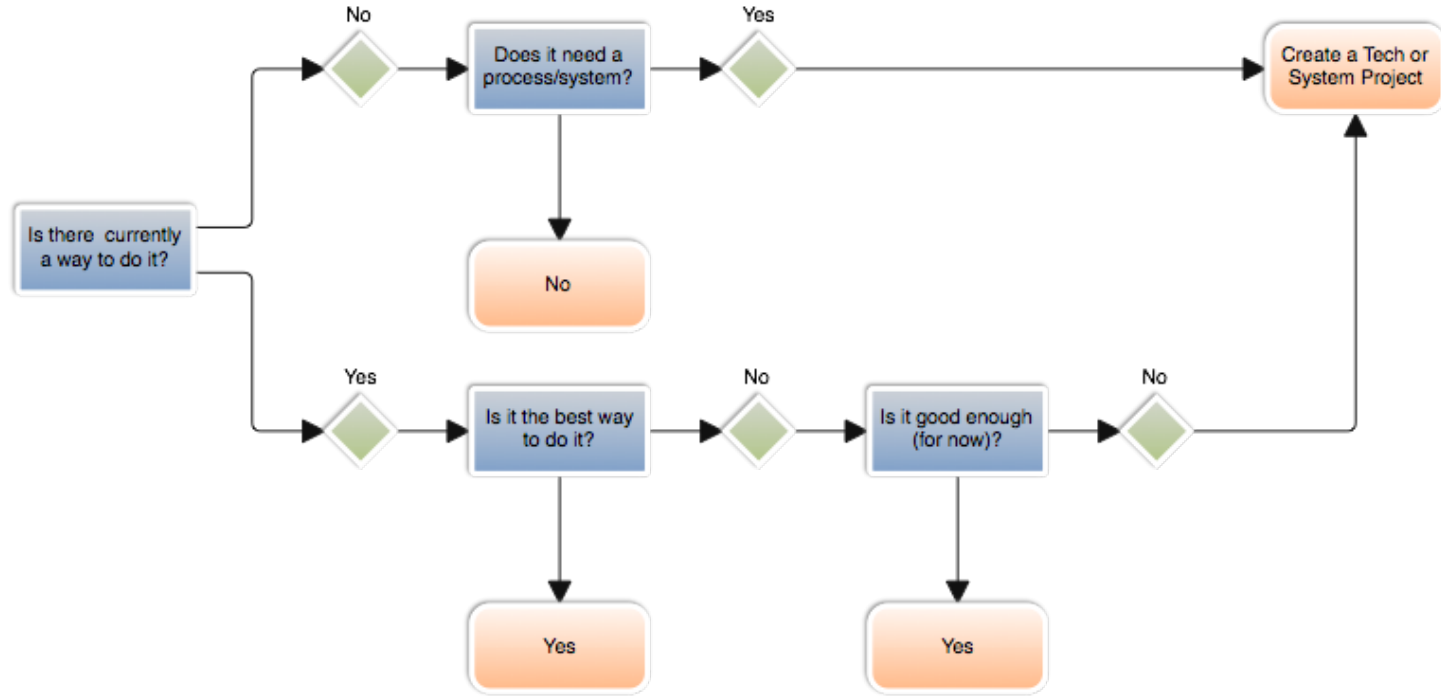
Our Approach

- Many areas of knowledge
- Many available tools
- Many complicating factors
- Focus on identifying and achieving goals
- Case studies

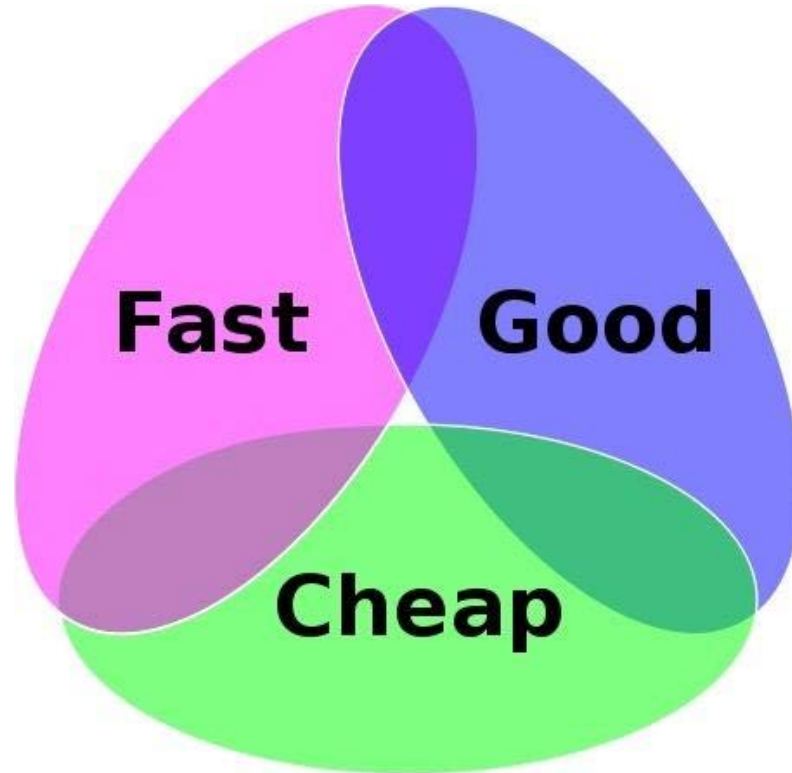
Project Development: Some Questions to Ask

- 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*?



Pick Two out of Three!



Case Study

Vanderbilt University Global Education Office

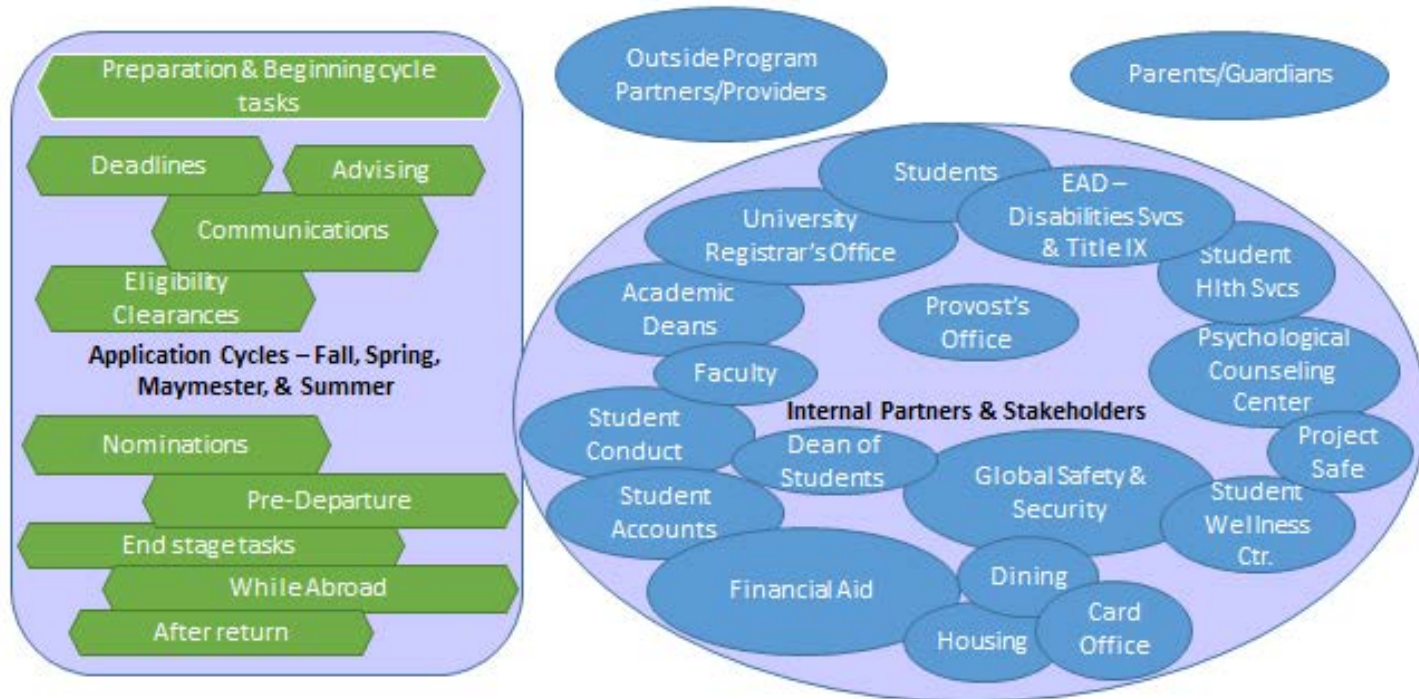
Vanderbilt University Global Education Office (GEO)

- 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

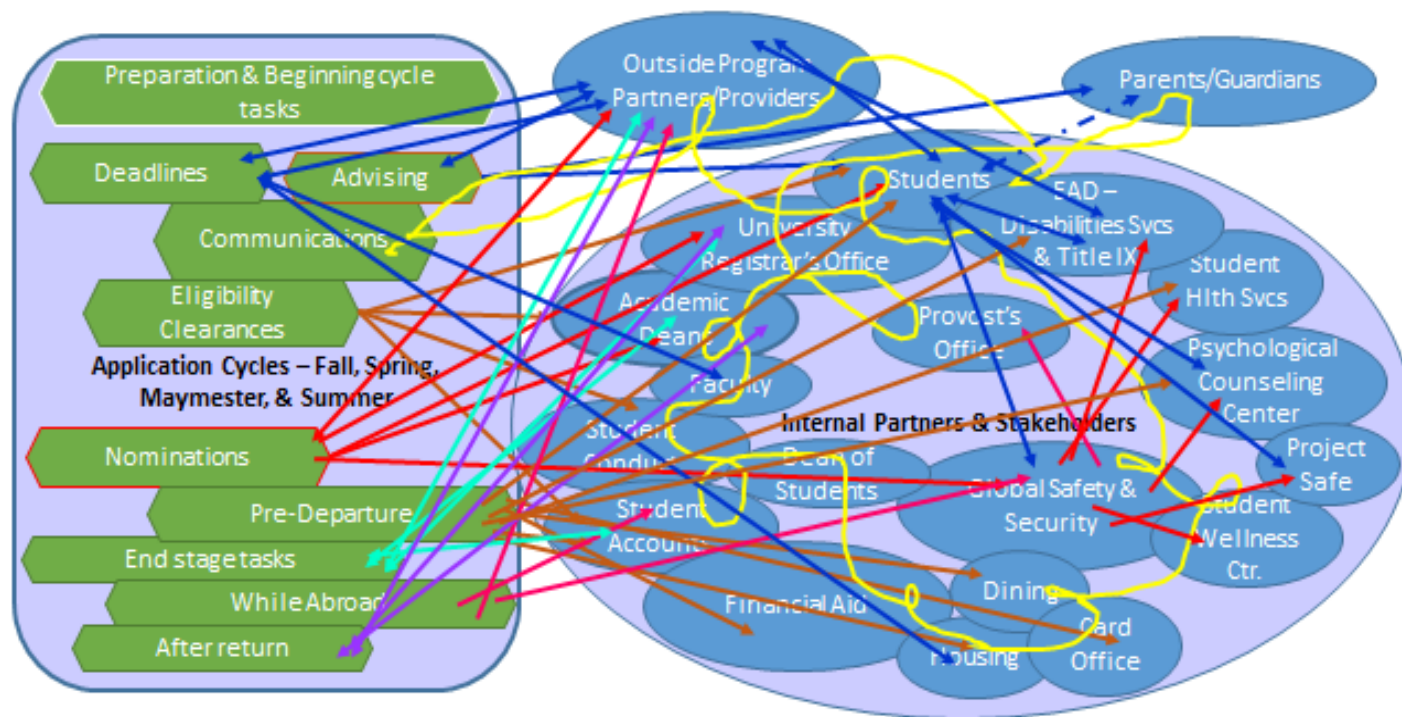
GEO's Problem

- 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 5  >
- ✓ Withdraw incomplete Spring Deadline 2 applications Sep 8  >
- ✓ Deadline: Spring Deadline 3 Sep 18  >
- ✓ Email: Follow up on Spring Deadline 3 Sep 19  >

 Ruth Page  Aug 22     




Spring 2018 Applicat... Clearances and nominations

✓ Nominations: Spring Deadline 1

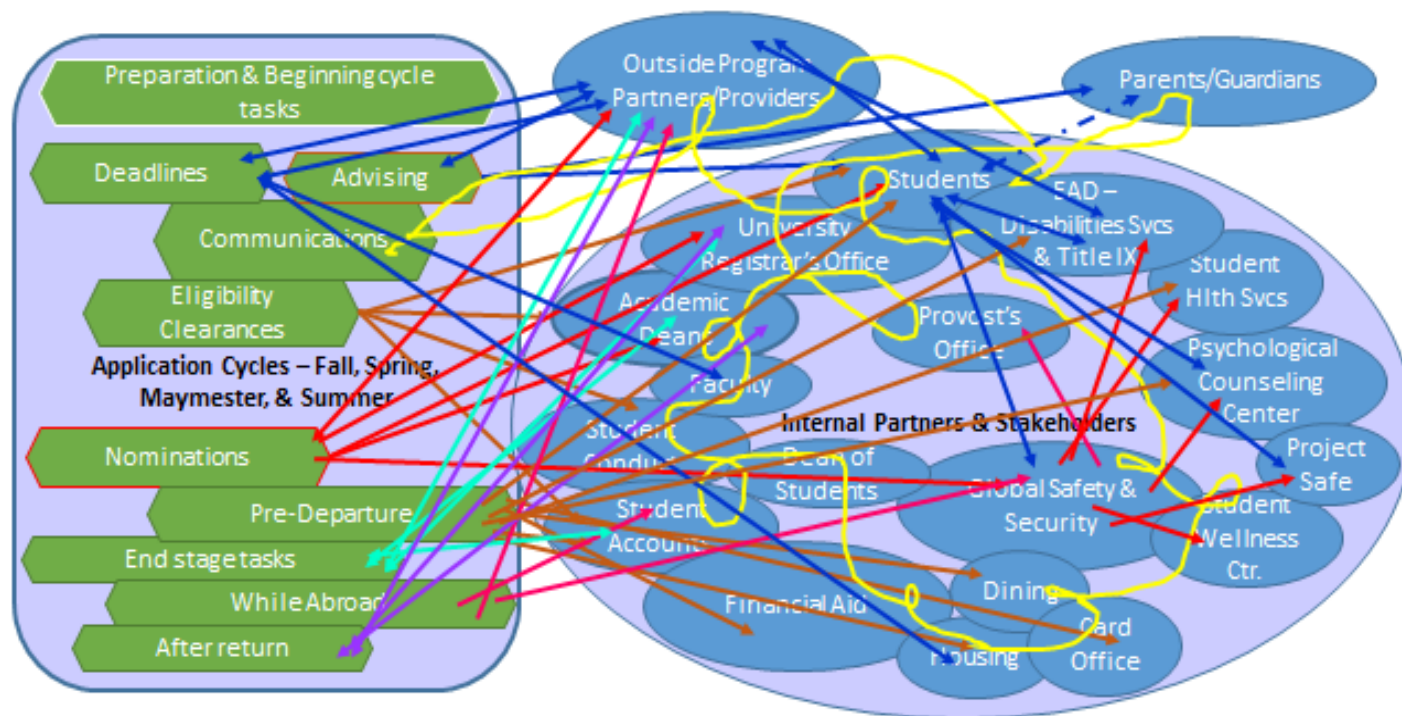
Please mark the task assigned to you as done when you have completed "all" of your nominations.

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):

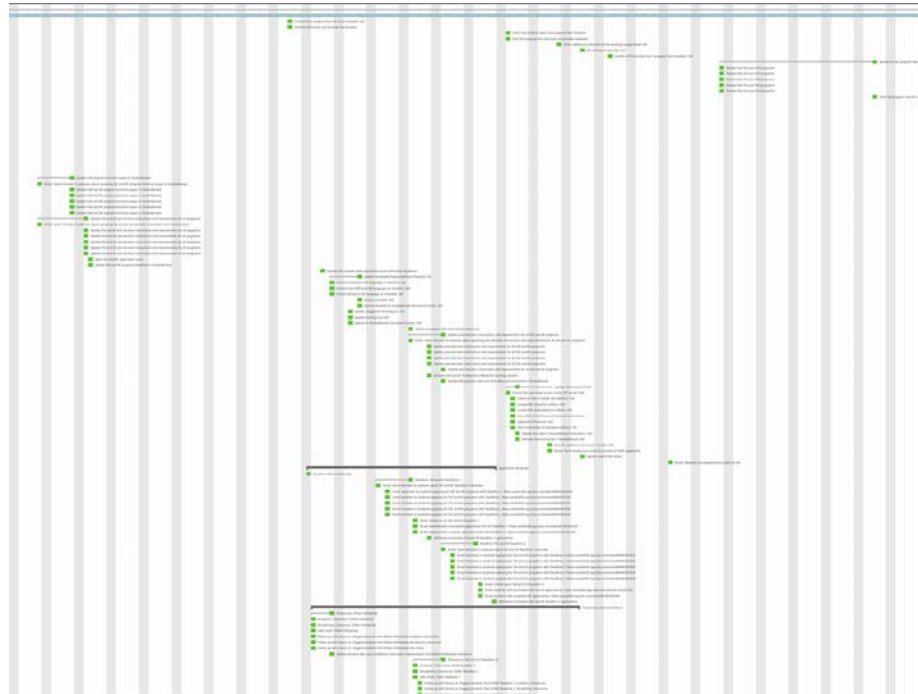
Aimee Leavitt
International Curriculum and Credentials Analyst
Vanderbilt University
Office of the University Registrar
110 21st Avenue South, Suite 110
Nashville, TN 37240-7701
Secure FAX: 615-343-7709
E-MAIL: studyabroadanalysis@vanderbilt.edu

- ✓ Email: Send reminder to advisors about Spring Deadline 1 Nominations Aug 21 
- ✓ Nominate eligible students (Spring Deadline 1) Aug 22 
- ✓ Nominate eligible students (Spring Deadline 1) Aug 22 
- ✓ Nominate eligible students (Spring Deadline 1) Aug 22 
- ✓ Nominate eligible students (Spring Deadline 1) Aug 22 
- ✓ Nominate eligible students (Spring Deadline 1) Aug 22 

Remember the Tangle?



GEO's Application Process



Additional Tools

All Files > GEO Shared Fol... > Application Mana... > Email templates > Clearances-stage eligibility email t...

Upload New ...

- Conditional nomination email template.boxnote
Updated May 22, 2017 by Ruth Page 3 KB 1 2
- Ineligible - academic probation email template.boxnote
Updated Feb 27, 2017 by Ruth Page 3.8 KB 1
- Ineligible - disciplinary probation email template.boxnote
Updated Sep 12, 2016 by Emma Buchanan 3.3 KB 1
- Ineligible - GPA below 2.7 email template.boxnote
Updated Sep 12, 2016 by Emma Buchanan 3.7 KB 1

Boards Application Requirements (Box: http://bit.ly/1Rr1LCI) GEO ☆

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

Assessment of Impact

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

Lessons Learned

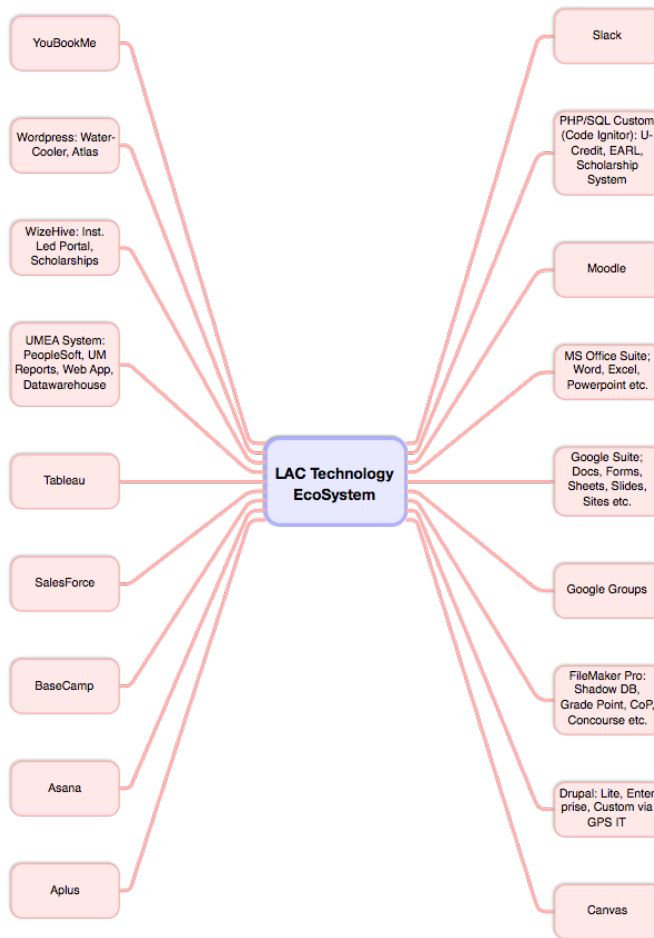
- Require a high level of detail
- Question assumed knowledge
- Expect an ongoing process
- Communicate, communicate, communicate!

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

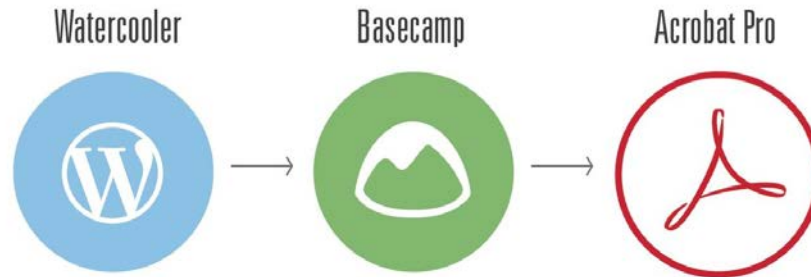


Using Basecamp PM Software as Workflow Tool

- 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



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.”**

The image shows a screenshot of a 'COMMUNICATIONS WORK REQUEST' form. The form is divided into several sections: 'NAME OF REQUEST' with a text input field; 'Requested by' with a text input field; 'Today's Date' and 'Delivery Date' with date input fields; 'TYPE OF JOB' with radio button options for 'New', 'Reprint', 'Reprint w/ changes', and 'Other', each with a text input field; 'CONTACTS' with 'First' and 'Second' name input fields; 'SPECS' with 'Qty.', 'Size', and 'Paper Color' input fields, and radio button options for 'Full Color' and 'Black & White'; and 'REQUEST DETAILS' with a large text area.

Step 1


Click on the link in the email. Then sign into Basecamp using your X.500 and password.

You've been added to the 001 Test Comm Project project on Basecamp Inbox x

 Emily Newhall (Basecamp) <notifications@basecamp.com> 12:29 PM (0 minutes ago) ☆ ↶ ▾
to me ▾

Emily Newhall added you to this project on Basecamp.

001 Test Comm Project
[Visit this project on Basecamp](#)



Sign in to
Basecamp

Remember me on this computer

Help: [Reset your 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 ☆

[Invite more people](#) [Catch up](#)
3 people on this project on recent changes

[3 Discussions](#) [23 To-dos](#) [2 Files](#) [Events](#) Add the first: [Text document](#)


Latest project updates


1:26pm You added a to-do: [Request a new project](#)
1:26pm You added a to-do: [Post an event](#)
1:26pm You added a to-do: [Distribute brochures](#)


[See all updates](#)

Discussions

[Post a new message](#) [Watch a quick video about Discussions](#)

 Emily N. [Instructions](#) - Please specify the following: *requested delivery date *quantity *size *paper color *full color or black and white 1:13pm

 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 1

To-do lists

[Add a to-do list](#) [Watch a quick video about To-Do Lists](#)

Work request management

Assign serial number and rename the project
 Archive this project
[Add a to-do](#)

Content to-dos

Make edits [Emily Newhall](#)
 Promote on social media [Emily Newhall](#)

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."

Communications Work Request ☆

[Invite more people](#)
3 people on this project

[Catch up](#)
on recent changes

[3 Discussions](#) [23 To-dos](#) [2 Files](#) [Events](#) Add the first: [Text document](#)

Latest project updates

- 3:44pm** You changed a to-do from 'Request new design project' to 'Begin new design project': [Begin new design project](#)
- 3:44pm** You changed a to-do from 'Request new writing project' to 'Begin new writing project': [Begin new writing project](#)
- 1:26pm** You added a to-do: [Request a new project](#)

[See all updates](#)

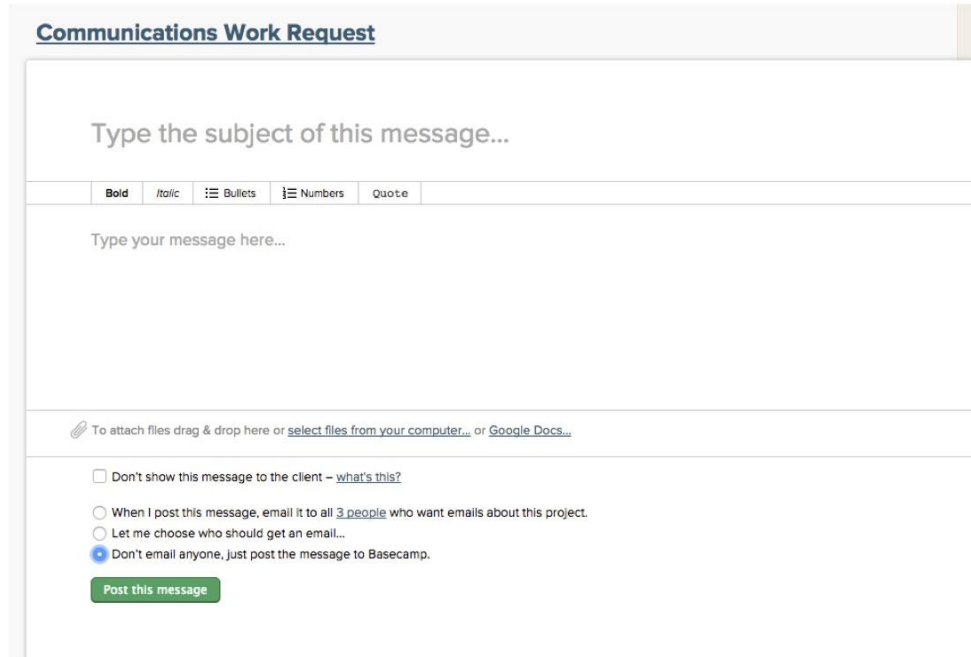
Discussions

[Post a new message](#)

[Watch a quick video about Discussions](#)

-  Emily N. [Instructions](#) - Please specify the following: *requested delivery date *quantity *size *paper color *full color or black and white 1:13pm
-  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 1

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.



The screenshot shows a web form titled "Communications Work Request". At the top, there is a text input field with the placeholder "Type the subject of this message...". Below this is a rich text editor toolbar with buttons for Bold, Italic, Bullets, Numbers, and Quote. The main body of the form is a large text area with the placeholder "Type your message here...". Below the text area is a link that says "To attach files drag & drop here or [select files from your computer...](#) or [Google Docs...](#)". At the bottom, there are four radio button options for notification settings: "Don't show this message to the client - [what's this?](#)", "When I post this message, email it to all [3 people](#) who want emails about this project.", "Let me choose who should get an email...", and "Don't email anyone, just post the message to Basecamp." The last option is selected. A green "Post this message" button is located at the bottom left of the form.

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.

Design to-dos 1 comment

- Begin new design project Ilya Kravchik
- Create new posters/handbills/handouts/forms/flyers Ilya Kravchik
- Film student experience video Ilya Kravchik
- Implement new design Ilya Kravchik
- Order business cards Emily Newhall
- Order nametag Emily Newhall
- Reprint posters/handbills/handouts/forms/flyers Ilya Kravchik
- Update contact details Ilya Kravchik
- Update photos Ilya Kravchik
- Update wordmark Ilya Kravchik

Create a sandwich board

Assigned to: Ilya Kravchik **Due on:** No due date

Ilya will be notified by email.

[Add this to-do](#) or [I'm done adding to-dos](#)

Event to-dos

- Conduct on-campus outreach
- Cover an event
- Distribute brochures

S	M	T	W	T	F	S
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

No due date

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.

Event to-dos

- Conduct on-campus outreach
- Cover an event
- Distribute brochures
- Post an event
- Request a new project

[Add a to-do](#)

Files

Add files

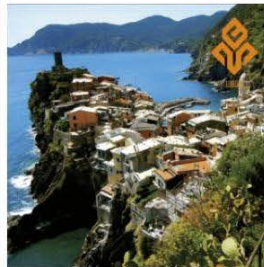
[Watch a quick video about Files](#)



PDF COMMENT demo_review.pdf

Added by Ilya K. on Nov 20, 2015 · 1 MB

Label...



Screen Shot 2015-11-19 at 3.41.43 PM.
png

Added by Ilya K. on Nov 20, 2015 · 1 MB

New Italy Tile Label...

Step 6

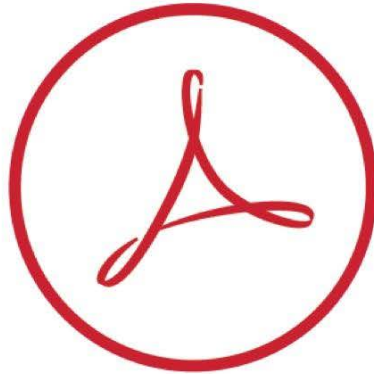
To see an overview of your projects, click on "Me" at the top of the page



Here you can view your latest activity and your open to-dos.

A screenshot of the Basecamp 'Me' page for user Emily Newhall. The page has a light beige background. At the top, there's a navigation bar with the Basecamp logo, 'New stuff!', and menu items: 'Projects', 'Calendar', 'Everything', 'Progress', 'Everyone', and 'Me'. A search box is on the right. Below the navigation bar is a user profile section for Emily Newhall, with a profile picture, email address 'enewhall@umn.edu', and a note 'Last active 2 hours ago · Invited by Brook Blahnik'. There are links for 'Update your personal info' and 'Your Basecamp settings'. The main content area is titled 'Your latest activity across all projects' and lists five recent activities with timestamps and descriptions. Below this is a section for 'Your open to-dos' with a 'Due:' filter set to 'Anytime'. There are two sections of to-dos: 'Communications Work Request - Content to-dos' and 'Communications Work Request - Design to-dos', each with a list of tasks and checkboxes.

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).



Managed Software Center

Software Categories My Items Updates Q Search



Managed Software Center

Your source for software for your Mac.

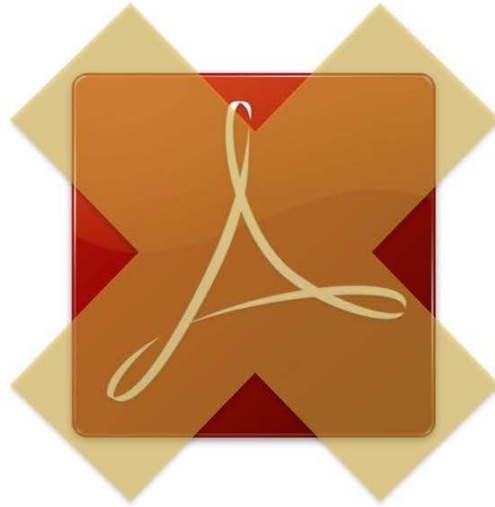
All items

 <p>270 Heller Copier Printers – GPS Alliance IT Installed REMOVE</p>	 <p>632 Heller Copier Printers – GPS Alliance IT Installed REMOVE</p>	 <p>Adobe Acrobat XI Pro Productivity – Adobe Installed REMOVE</p>
 <p>Adobe Dreamweaver CS6 Creative – Adobe Installed REMOVE</p>	 <p>Adobe InDesign CS6 Creative – Adobe Installed REMOVE</p>	 <p>AdobeContribute Creative – Adobe INSTALL</p>
 <p>Caffeine Utilities – Lighthouse Software INSTALL</p>	 <p>Creative Suite 6 Design Sta... Creative – Adobe Installed REMOVE</p>	 <p>EasyFind Utilities – DEVONtechnologies Installed REMOVE</p>
 <p>Evernote Productivity – Evernote, Inc. INSTALL</p>	 <p>FileMaker Pro 13 Productivity – Apple INSTALL</p>	 <p>FileZilla Internet – Cloud – OSS INSTALL</p>
 <p>Fitbit Connect Utilities – Fitbit Inc. INSTALL</p>	 <p>GarageBand Creative – Apple INSTALL</p>	 <p>Google Drive Internet – Cloud – Google Installed REMOVE</p>
 <p>iMovie Creative – Apple INSTALL</p>	 <p>iPhoto Creative – Apple INSTALL</p>	 <p>Java 6 for OS X Plugins – Apple Installed REMOVE</p>

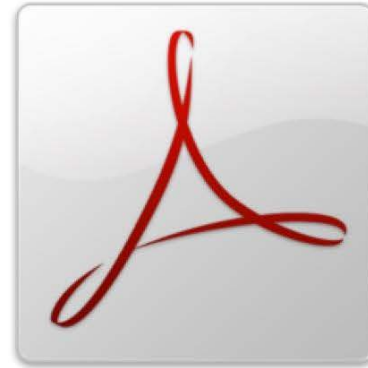
Categories

- Communication
- Creative
- Internet – Cloud
- Media
- Plugins
- Printers
- Productivity
- Utilities
- Virtualization

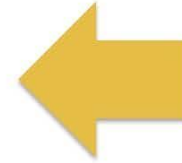
Adobe Acrobat Pro should not be confused with *Acrobat Reader*



**Adobe Acrobat
Reader**
(do not use)



**Adobe Acrobat
Pro**
(use!)

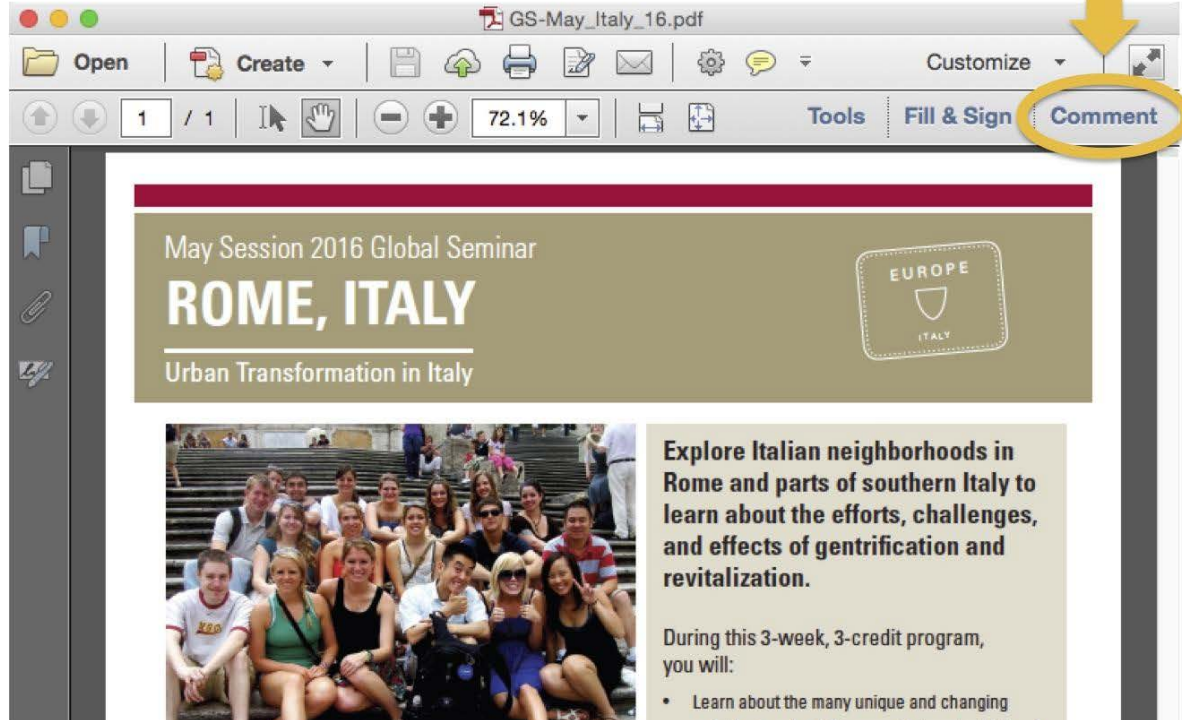


Step 1

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.

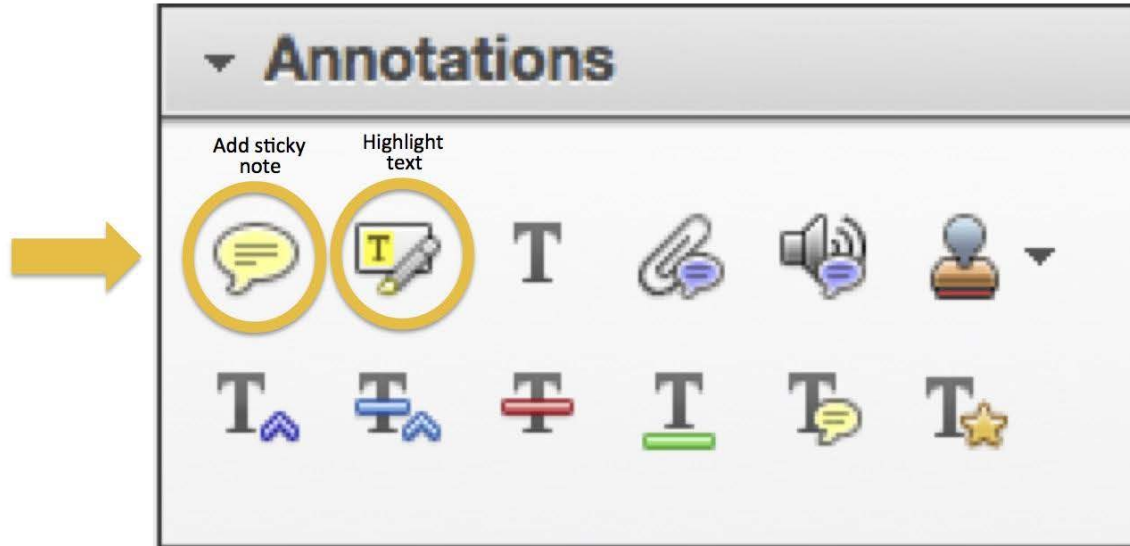


The “Annotations” and “Drawing Markups” drop-down menus provide commenting options

The image shows a PDF viewer window titled "GS-May_Italy_16.pdf". The main content area displays a seminar page for "May Session 2016 Global Seminar" in "ROME, ITALY" focusing on "Urban Transformation in Italy". The page includes a group photo of students and text describing the seminar's goals and activities. On the right side, a sidebar contains two toolbars: "Annotations" and "Drawing Markups". Both toolbars are circled in yellow. The "Annotations" toolbar includes icons for text, image, link, and other annotation types. The "Drawing Markups" toolbar includes icons for lines, arrows, shapes, and eraser. Below these toolbars is a "Review" section with a "Send for Shared Review" button and a "Comments List (0)" section. At the bottom of the sidebar, it states "This document has no comments."

Step 2

Select the “add sticky note” comment option. (You can also use the highlight tool)



You can add notes (and highlight text)

The screenshot displays the Adobe Acrobat Reader interface. The main document is a PDF titled "May Session 2016 Global Seminar ROME, ITALY Urban Transformation in Italy". The document content includes a group photo of students, a paragraph about exploring Italian neighborhoods, and a list of activities. A yellow highlight is applied to the text "Explore Italian neighborhoods in Rome and parts of southern Italy to learn about the efforts, challenges, and effects of gentrification and revitalization." A comment box is open over this text, containing the text "Change to read: Explore the city of Rome". The right-hand side of the interface shows the "Annotations" and "Comments List" panels. A yellow arrow points from the main document area to the "Annotations" panel, which contains a yellow speech bubble icon. The "Comments List" panel shows a list of comments, with the most recent one highlighted in yellow.

GS-May_Italy_16_markup.pdf

Open Create 100% Tools Fill & Sign Comment

Annotations

Drawing Markups

Review

Send for Shared Review

Send for Email Review

Track Reviews

Comments List (3)

Find

kravc003 1/7/16, 1:47:58 PM

Change to read: Explore the city of Rome

kravc003 Page 1 1/7/16, 1:47:58 PM

kravc003 Page 1 1/7/16, 11:43:29 AM adobe.png

kravc003 Page 1 1/7/16, 1:47:58 PM Change

May Session 2016 Global Seminar

ROME, ITALY

Urban Transformation in Italy

EUROPE ITALY

Explore Italian neighborhoods in Rome and parts of southern Italy to learn about the efforts, challenges, and effects of gentrification and revitalization.

During this 3-week, 3-credit program you will:

- Learn about the many unique and charming neighborhoods of Rome, and interact with the residents living in these communities.
- Explore the historical center of Naples on a day trip.
- Visit the Trulli (beehive houses) in Albertobello, and the ancient cave dwellings in Matera.

Led by Kathleen Rider from the French & Italian Department.

Approved for Social Science core and Global Perspectives theme Liberal Education requirements.

Receive credit for ITAL 3640.

Learning Abroad Center Global Seminars allow you to:

Step 3

When you're done, use "Save As" to save the PDF file as a version (V1, V2, V3, etc...).

The screenshot shows the Adobe Acrobat interface. The 'File' menu is open, and the 'Save As...' option is highlighted with a yellow circle and a yellow arrow pointing to it from the left. The PDF document in the background is titled 'GS-May_Italy_16.pdf' and features a header for the 'May Session 2016 Global Seminar' in 'ROME, ITALY' with the subtitle 'Urban Transformation in Italy'. A logo for 'EUROPE ITALY' is also visible. Below the header is a group photo of students sitting on steps, and a text box that reads: 'Explore Italian neighborhoods in Rome and parts of southern Italy to learn about the efforts, challenges, and effects of gentrification and revitalization.' Below this is a list of bullet points: 'Learn about the many unique and changing neighborhoods of Rome, and interact with locals living in these communities.', 'Explore the historical center of Naples on a day trip.', and 'Visit the Trulli (beehive houses) in Albertobello, and the ancient cave dwellings in Matera.' At the bottom, it states 'Led by Kathleen Rider from the French & Italian Department.' and 'Approved for Social Science core and Global Perspectives theme Liberal Education requirements.'

Finishing it out...

- **Step 4**
 - Upload your PDF file to Basecamp. A commie will then start working on implementing the changes you have request
 - 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

Retention & Pipeline Management

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

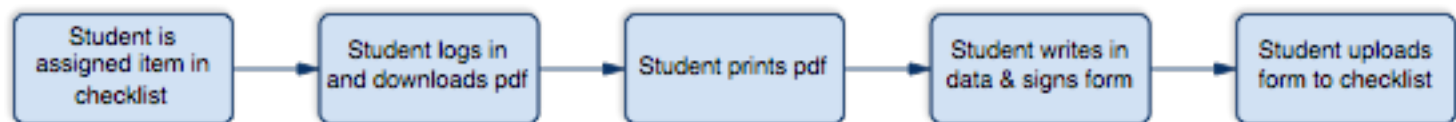
- Reduce the amount students have to turn in
- Make what they have to turn in easier to understand
- Make it easier for them to turn it in
- Provide reminders at key points about what they have to do / turn in

Large Scale Solution Development

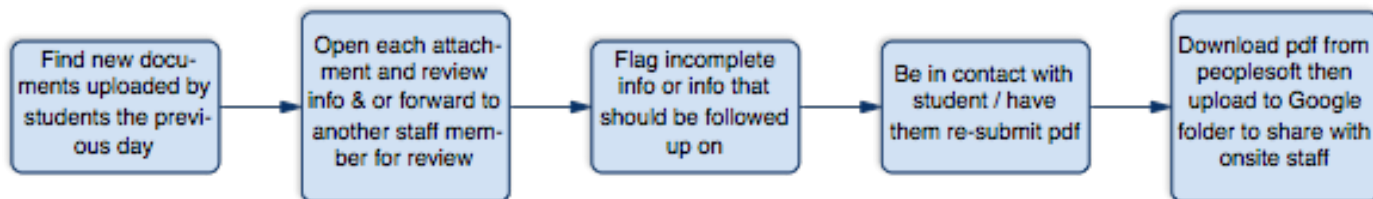
Solution - NOT going to do a purely 'off the shelf' solution. We'll build it - Semi-Custom

- 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



Staff Process



Technology Tools for the Build

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

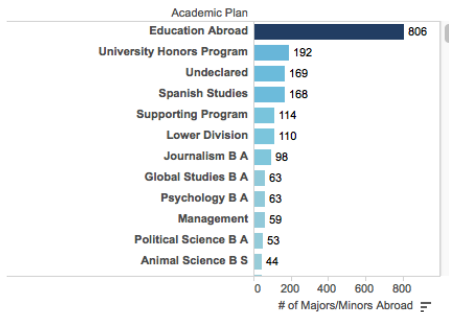
- Drupal framework
- Tableau Analytics Software & Server
- PeopleSoft / Datawarehouse
- MySQL & University data store
- PHP/JavaScript/HTML/CSS...and probably some other fairy dust

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

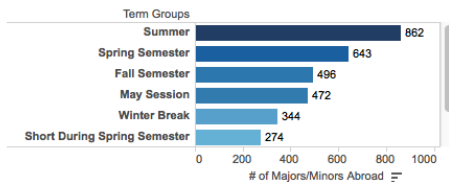
UMEA Resource Site

- [Main page](#)
[PHP Test](#)
[Sample Form](#)
[Tableau Test](#)
[Cows!](#)
[Dashboard Test Embed](#)

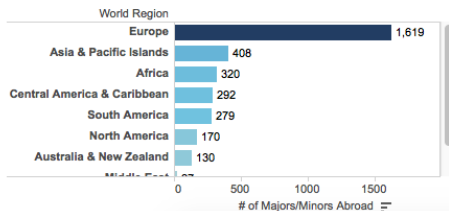
College: Plan Detail View



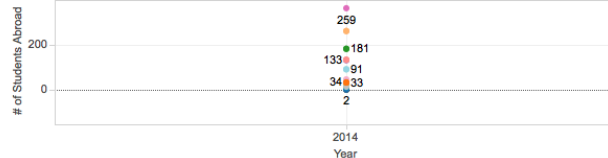
College: Term Information



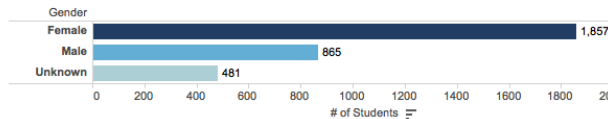
College: Region Information



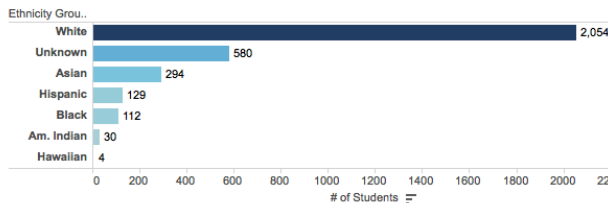
College: Participation



College: Gender Information



College: Ethnicity Information



College: Heat Map



College

(All)

Population Filters

EA Office

(All)

Year

2014

Student Info Filters

Home Institution

UMNTC

Plan Type

(All)

Academic Careers

(All)

PLEASE NOTE:
Data refreshes once per week on Saturdays.

This dashboard displays the numbers of students from the colleges - Participation

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?

A photograph of a city skyline featuring several prominent skyscrapers. In the foreground, a multi-arched bridge spans across the frame. The sky is clear and blue. The text "THANK YOU" is overlaid in the upper center of the image.

THANK
YOU