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Module 4
Methods and Tools
"What tools do I have at my disposal?"

Module 4.1
Project management

18 slides – version September 2023

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ifeu INSTITUT FÜR ENERGIE-
UND UMWELTFORSCHUNG
HEIDELBERG

TdLab
GEOGRAPHIE
UNIVERSITÄT
HEIDELBERG
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NATIONALE
KLIMASCHUTZ
INITIATIVE

aufgrund eines Beschlusses
des Deutschen Bundestages

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Toolbox content

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Module 1 Introduction: "Why a Toolbox?"

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Module 2 Checklist: "Where do we stand?"

3

Module 3 Backgrounds & Arguments: "What backgrounds should I know?"
  3.1 Relevance
  3.2 Travel reasons
  3.3 Framework conditions
  3.4 Success factors & stumbling blocks
  3.5 Sufficiency

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Module 4 Methods & Tools: "What tools are available to me?
  4.1 Project management
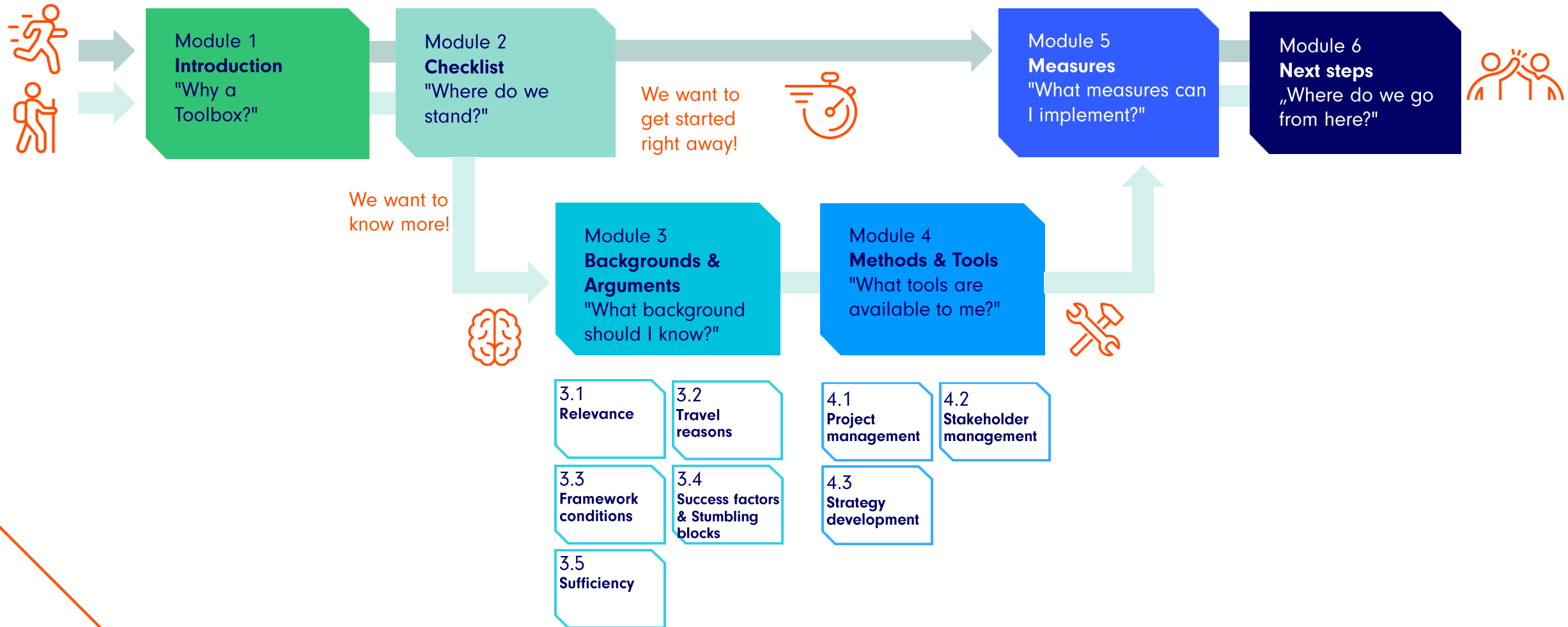 **4.2** Stakeholder management
  4.3 Strategy development

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Module 5 Measures: "What measures can I implement?"

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Module 6 Next steps: "Where do we go from here?"

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Flowchart Toolbox

Module 1
Introduction
"Why a Toolbox?"

Module 2
Checklist
"Where do we stand?"

We want to get started right away!

We want to know more!

Module 3
Backgrounds & Arguments
"What background should I know?"

Module 4
Methods & Tools
"What tools are available to me?"

Module 5
Measures
"What measures can I implement?"

Module 6
Next steps
„Where do we go from here?"

3.1
Relevance

3.2
Travel reasons

3.3
Framework conditions

3.4
Success factors & Stumbling blocks

3.5
Sufficiency

4.1
Project management

4.2
Stakeholder management

4.3
Strategy development

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How to use the toolbox?

The **FlyingLess Toolbox** is a modular collection of content and methods on the topic of reducing air travel.

Depending on the occasion or need, suitable modules or individual modules or individual slides can be selected and used.
The order of the modules is only a recommendation.

Depending on your level of knowledge and interest, you can start with different modules.

The FlyingLess logo and the link to the website (www.flyingless.de) should remain on the slides.

The Toolbox can be used under the terms of the [CC-BY 4.0](CC-BY 4.0) license. Each module has its own copyright notice and constitutes a separate work under the [CC-BY 4.0](CC-BY 4.0).

However, individual images and graphics are under different licenses or were quoted and are not under the [CC-BY 4.0](CC-BY 4.0). In the case of subsequent use, the licensing conditions of these licenses or the right of citation must be respected or the corresponding works must be removed.

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4.1
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Module 4.1: Project management

What do I find in this module?

› Structured and effective project management is necessary to transform the academic sector to net zero emissions.

› The slides in this module present the different elements of project management and related change processes so you can make this transformation.
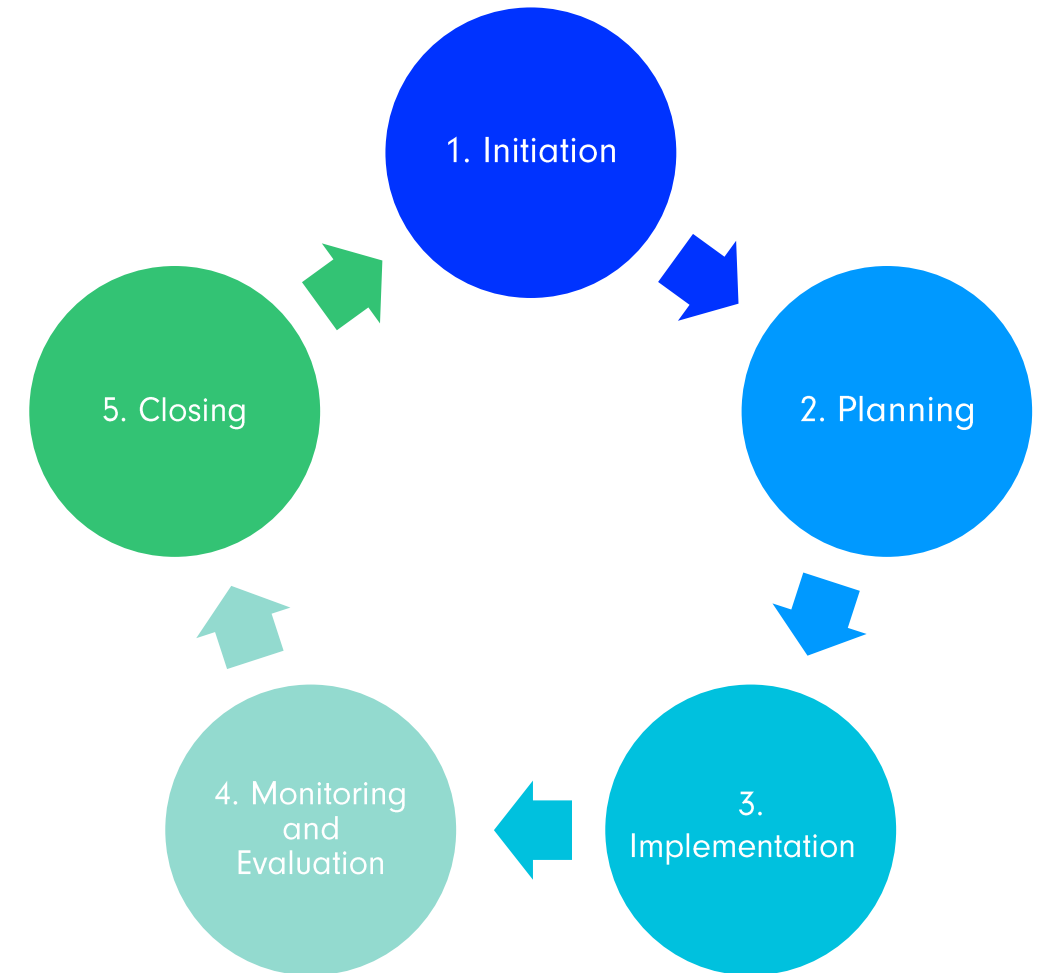
What can I use the module for?

› Find out about project management's core elements.

› Identify the tools relevant for different aspects of project management.

› Anticipate the opportunities and risks involved in managing projects and change processes.

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Overview - Phases of project management
How do I implement projects effectively?

› **Classic project management** delineates four project phases: initiation, planning, implementation and completion.

› **Agile project management** follows an iterative approach compared to classic approaches.

› The following slides present concrete methods to help you with the respective project phases.

› The methods presented here combine these approaches.

1. Initiation

2. Planning

3. Implementation

4. Monitoring and Evaluation

5. Closing

Figure: Own presentation, systematics is based on Jacob, Klaus; Graaf, Lisa; Büttner, Hannah (2018): Development, implementation and evaluation of strategies in the portfolio of the Federal Ministry for the Environment. Developed as part of the project "Creation of a strategy development guide - analysis and evaluations of strategy understandings, processes and effects in the BMUB division and further development of the 2012 strategy guide" (FKZ 3716 11 702). FFU; Integrative Dialogues. Berlin & Munich.

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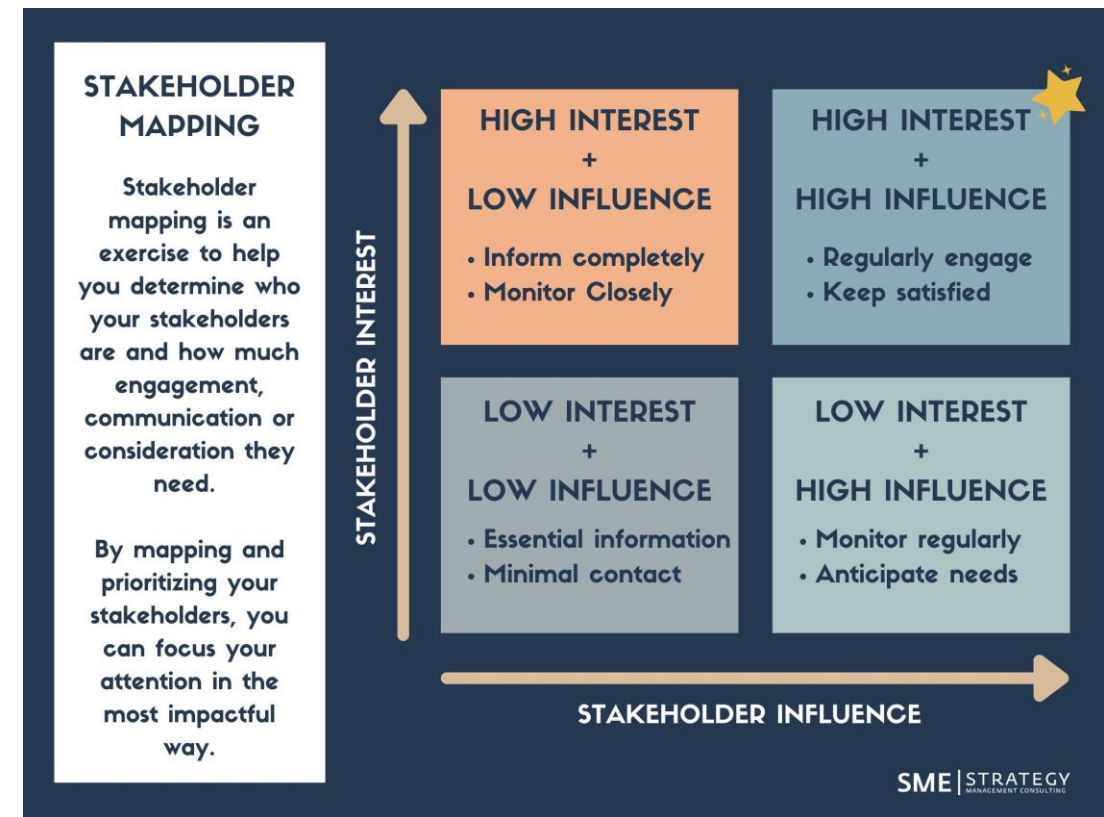# 1. Project initiation
What are my conditions for success?

› Identify your goals and priorities at the beginning of the project, and the means you can use to achieve them

› Following the classic project management triangle, cost, time and quality are closely linked and mutually dependent

› Projects with a short time frame and high quality usually cost more

› Reducing costs often impacts quality or the time it takes to implement the project

› Combining higher quality and lower costs usually requires more time

DONE QUICKLY

Cheap & Quick = Low Quality

Fast & Good = Expensive

LOW COST

Cheap & High Quality = Low Priority

HIGH QUALITY

1. Project initiation
Who is part of the project?

› In many projects, work is started quickly without clearly defining in advance which stakeholders are involved, what interests they pursue, what perspectives they bring to the table, and what role they play in the process

› Clearly define the project process (including regular meetings), design deliverables and assign responsibilities

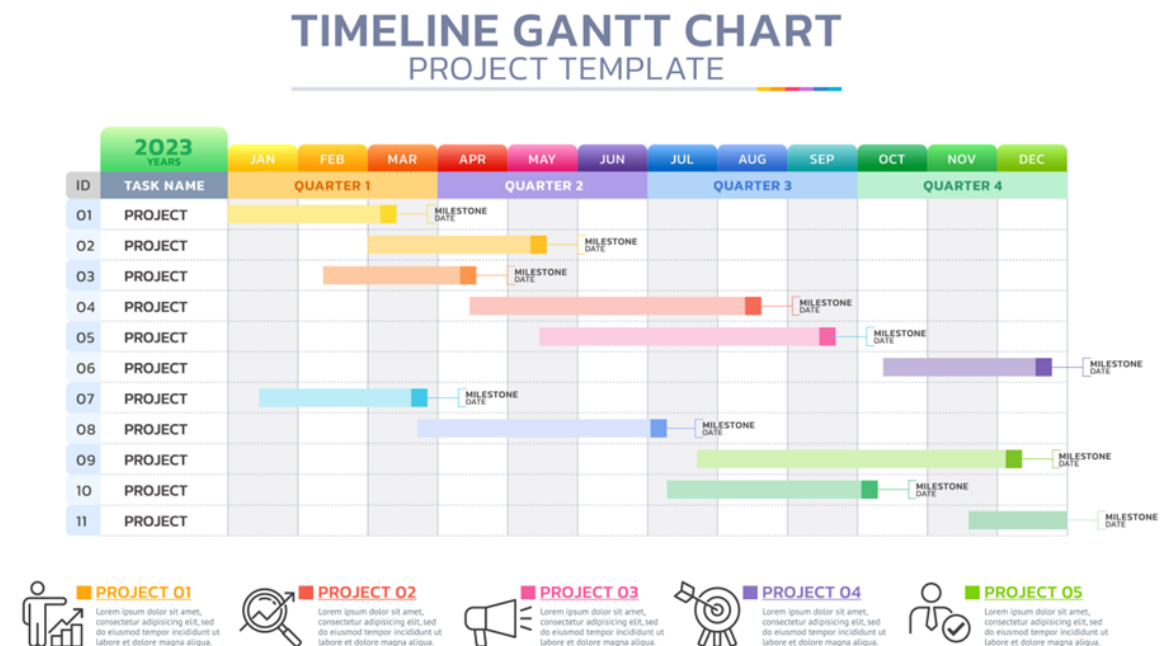› A structured stakeholder analysis, for example, helps in this regard (see Module 4.2)

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2. Project planning
What will be implemented when and by whom?

› Regardless of the approach (classic or agile), clearly define at
the start of project planning which work packages to
implement including by when and by whom

› Many different tools are available for this purpose, ranging
from classic work package descriptions and GANTT charts to
SCRUM or Kanban boards (see the examples on the following
slides)

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3. Implementation:
GANTT charts

› **Description:** GANTT charts are tools of classic project management, such as waterfall models; however, they are also still used in agile approaches to some extent.

› **Implementation:** Usually, GANTT charts list the work phases by month on the x-axis, whereas the respective tasks are on the y-axis.

› GANTT charts make it possible to enter details for each month regarding who is responsible for each task and when in the project process. These charts also are useful for noting when milestones must be reached so that the project can be successfully completed.
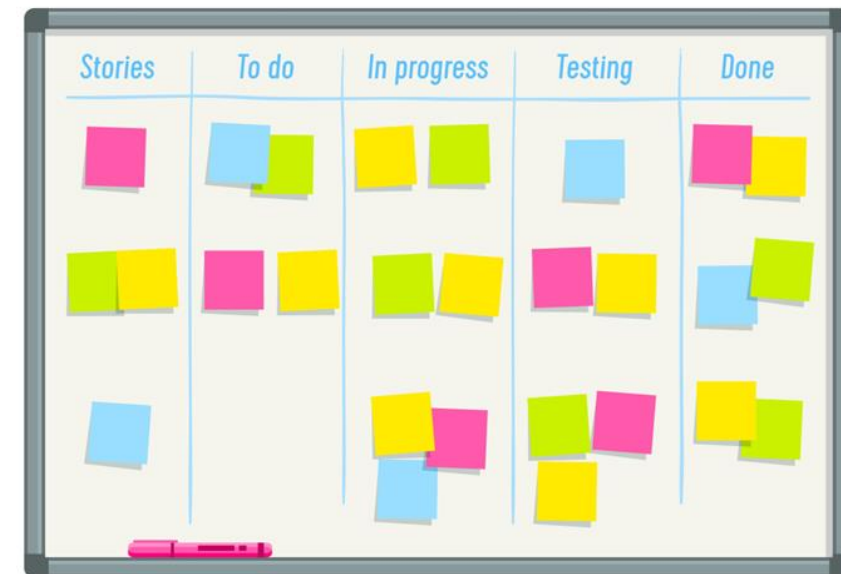

Figure: graphixmania - stock.adobe.com

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3. Implementation:
Kanban and Wall of Work, Task Board (visualisation)

› **Description:** The term "Kanban" means visual signal. A Kanban system is a tool for visualising the tasks and the work process. Team members use cards to visualise tasks and the project progress on a Kanban board. This way, a team has insight into the status of the work at any time and can organise, plan and improve more easily.

› **Implementation:** The visualisation can be attached to the wall at a common meeting point, e.g. using a poster board and PostIts. Alternatively, a digital whiteboard can be used as a common workspace, especially if the implementation teams are spread out.

› Project group members contribute to the creation and maintenance of the Wall of Work in regular "stand-up meetings" in which the progress of the implementation process is jointly monitored.

Resources

› Laloux, Frederic (2016) Reinventing Organizations visually. An Illustrated Guide to Meaningful Forms of Collaboration, Vahlen Franz GmbH

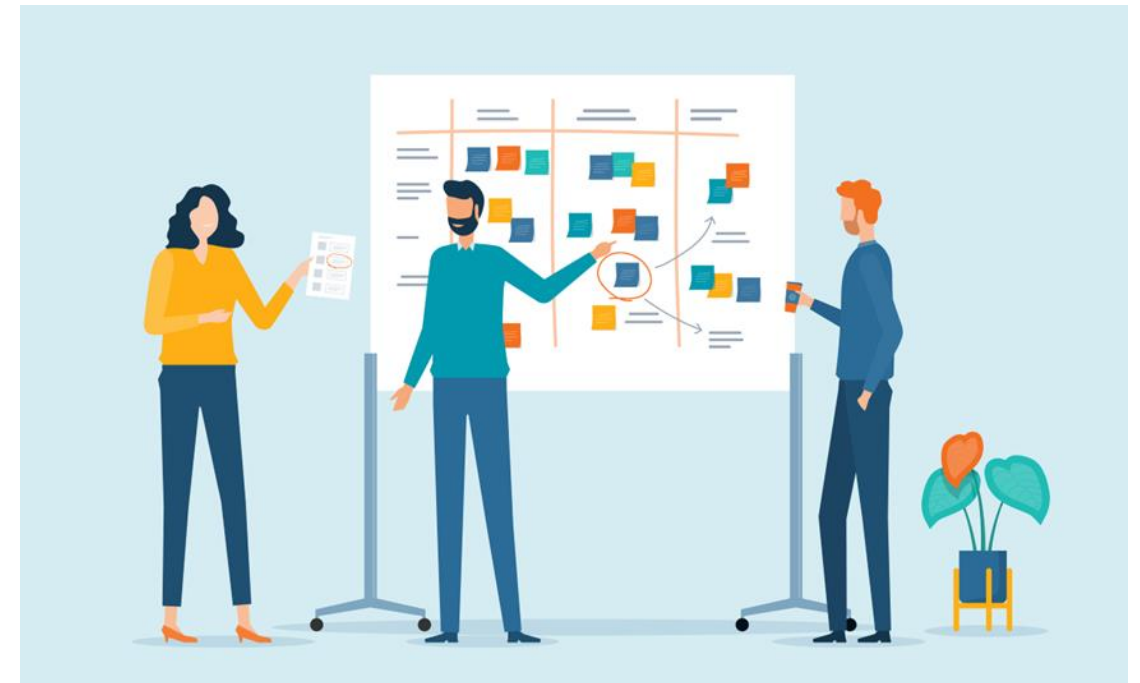› Online tools or digital whiteboards with many templates: www.miro.com or www.mural.com

Figure: Vector Tradition – stock.adobe.com

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3. Implementation:
Stand-up meetings

› **Description:** A stand-up is a short, regularly recurring appointment for a team or project group to effectively and efficiently monitor project progress and coordinate work.

› For example, stand-ups can be an effective and efficient way to facilitate stakeholder cooperation to reduce air travel in the institution.

› **Implementation:** Define a project group and schedule regular (e.g. bi-weekly) 30-minute meetings. Groups of 7-12 are ideal for this kind of self-organised work.

› During the stand-up, participants can use the Kanban method (Wall of Work) to review and distribute upcoming tasks.

Resources

› Kuster, J. et. al. (2019) Handbuch Projektmanagement: Agil - Klassisch - Hybrid. Springer Gabler

› Online tools or digital whiteboards with many templates: www.miro.com or www.mural.com
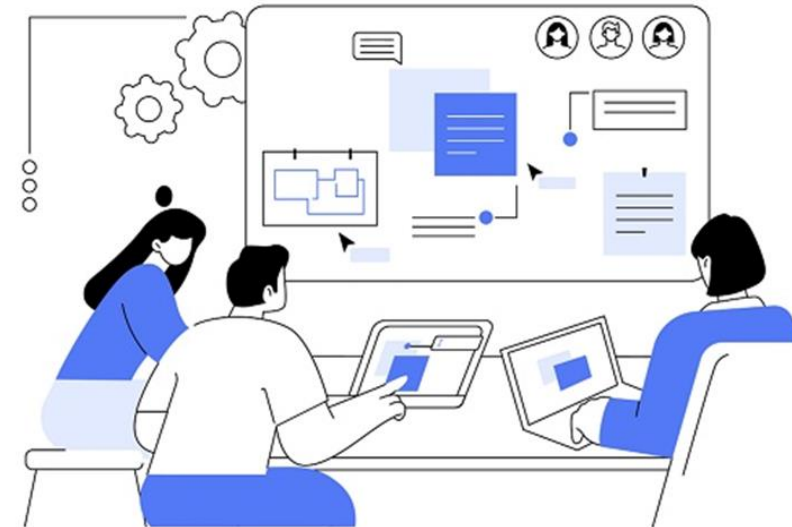
Figure: apinan – stock.adobe.com

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4. Monitoring and evaluation: Retrospectives

› **Description:** A recurring appointment for a team or project group, the retrospective serves to strengthen cooperation and the effectiveness of the project group.

› **Implementation:** The retrospective is usually carried out at certain milestones. It can also be scheduled as a regular monthly meeting, for example.

› A simple retrospective can follow the "4 L" scheme:

  › What have we done so well that we need to talk about it so that we don't forget it? (Loved)

  › What have we learned? (Learned)

  › What do we need to do differently in the future? (Lacked)

  › What would have helped me? (Longed)

› Participant outcomes are visualised, reflected on together and used for planning further tasks and meetings. Useful visualisation tools include PostIts on flipcharts or digital whiteboards such as Miro (see graphic on the right).

Resources

› Kuster, J. et. al. (2019) Handbuch Projektmanagement: Agile - Classic - Hybrid. Springer Gabler

› Online tools or digital whiteboards with many templates: www.miro.com or www.mural.com

Figure: Visual Generation - stock.adobe.com

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Excursus (1/3)
Project cycle

› From first idea to project completion, the project life cycle provides a structure to ensure stakeholders are consulted.

› It defines the key decisions, information needs and responsibilities at each stage so that informed decisions can be made at each stage of the project life cycle.

› It also relies on evaluation to incorporate lessons learned into the design of future programmes and projects.

What is a Project Life Cycle?

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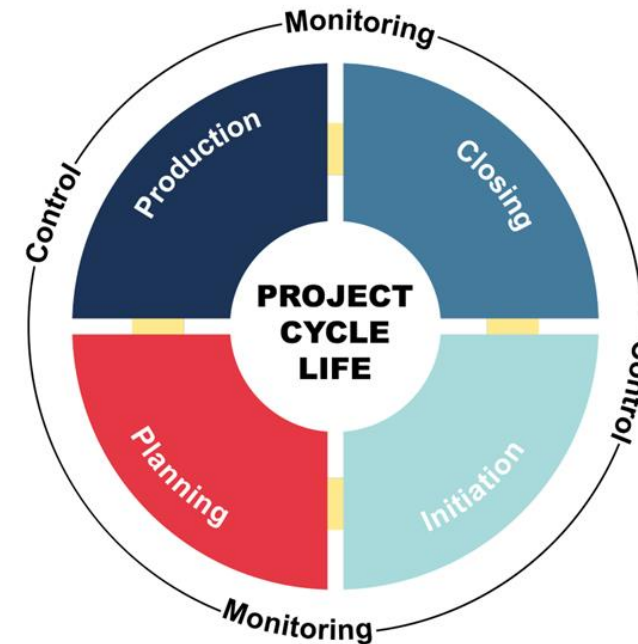
Excursus (2/3)

Monitoring and evaluation with the help of digital tools

› Visualization aids such as Kanban* boards are often used to organize tasks in a project

› There are now a number of online tools with a collaboration function that take up the concept of visualizing work packages

› Here is a list of popular tools that often offer a free basic version

    › Asana: https://asana.com/

    › Basecamp: https://basecamp.com/

    › Jira Software: https://www.atlassian.com

    › Trello: https://trello.com/

    › Etc.

* Kanban comes from the Japanese and means sign/poster

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Excursus (3/3)
Leadership transformation process (1/2)

Define goal

Visually write outcome desired

Assess position

Seek feedback from others

Reflect

Self-review towards goal

Learn

On a constant basis

Acknowledge success

Recognize, reinforce, motivate!

DARLA
(Steps for constant improvement)

Figure: Own representation according to Agile Leadership Transformation Process

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Excursus (3/3)
Leadership transformation process (2/2)

How to become an agile leader with self-transformation process?

Five simple steps to start your leadership transformation to become a motivating, stimulating and influential leader.

› Two-pronged, for yourself and for your team (i.e. the company)

› As this is a leadership style in which leaders encourage, inspire and motivate their staff to innovate, leaders can bring about change in a way that promotes both their personal growth and that of the team.

› Through this process, leaders can work with their teams beyond their immediate personal interests to identify necessary changes. A vision emerges that guides change through influence and inspiration.

Define goal
Visually write outcome desired

Assess position
Seek feedback from others

DARLA (Steps for constant improvement)

Reflect
Self-review towards goal

Learn
On a constant basis

Acknowledge success
Recognize, reinforce, motivate!

Figure: Own representation according to Agile Leadership Transformation Process

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About FlyingLess

The aim of the FlyingLess project is to support universities and research organisations in reducing air travel, which causes a significant part of their total greenhouse gas emissions.

FlyingLess develops approaches to reduce air travel in the academic sector, which are implemented at different levels (research, teaching and administration).

The project is being carried out in close cooperation with four pilot institutions - EMBL (EuropeanMolecular Biology Laboratory) and MPI Astronomy in Heidelberg as non-university research institutions and the Universities of Konstanz and Potsdam as universities.

Further information can be found on the website www.flyingless.de.

The project is being led by ifeu Heidelberg in close cooperation with the TdLab Geography at the Institute of Geography at Heidelberg University.

The project is funded over 3 years as part of the National Climate Initiative (NKI) of the Federal Ministry for Economic Affairs and Climate Protection.

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