TESLAWORKS

III. Managing a Project

All of our projects have different goals, use meetings differently, and offer different experiences for their members.

However, there are some expectations of all projects. Most of these exist so that the Officers Board can stay up-to-date with all of the projects and help you to the best of their ability. This section contains these expectations along with tips and tricks for successful projects. If you need additional help, reach out to the Officers Board.

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A. Project Meetings

Project meetings are a good way to get the whole team together to talk about goals, progress, and plans, although different projects use meetings in different ways. Some projects use meetings for the team to plan and build together. Other projects will have members work independently on tasks and use meetings to share progress.

Most projects choose a time to meet once they have a list of interested members. If it's not possible to find a time that works for everyone, try incorporating Skype, Google Hangouts, or other video chatting platforms so members can participate off-site.

1. Advice on running a project meeting from project managers

   Every Project Manager runs meetings differently, so don't feel like you *have* to do any of the things listed below, but these are some tips and tricks that might work well for you.
   - Plan out what you want to do in a meeting beforehand and stick to your plan
     - Makes meetings more efficient
     - Shows project members that you care about the project
   - Provide food for your members
     - It's (probably) scientifically proven that telling people there will be food at a meeting increases meeting attendance
     - This doesn't have to be at every meeting, but some possibilities are:
       - You just had a bunch of people sign up for your project and you want to make sure they actually show up
       - Your project just accomplished a big goal and you want to celebrate
   - If members work on tasks independently
     - Go over updates at the start of each meeting
     - Make it clear that it's okay if no progress got done
       - Not ideal for every week, but we are all students and classes are hard
     - Decide what needs to get done this week and assign tasks to project members
       - It's okay if some members want more work than others
       - Assign specific tasks each week so members know roughly how much time they will need to put in
     - This is a great way to keep members feeling committed to your project
     - Keep a list of assigned tasks
       - Utilize the To-Do feature of Basecamp
   - If everyone works on the project together during meetings
     - Plan your work around the skillset of your members
       - Keep in mind that major doesn't equal interest
     - Have a clear list of tasks that need to get done
       - Have an idea of which people you want to work on each task

- - ○ Keep in mind your end of semester goals and have more work in case things get done more quickly than expected or new members show up
  - Incorporating new members
    - ○ If your project is more technical, you may want to meet one-on-one with new members
      - ■ Give them a crash course on your project
      - ■ Gauge interest and see what they want to work on
    - ○ Give them useful tasks to work on at meetings
    - ○ Have all of the members introduce themselves at the beginning of your meeting
    - ○ Keep in mind that everyone works differently
      - ■ Some people want to get involved in EVERYTHING
      - ■ Others want fewer tasks and to be more loosely involved
      - ■ Be flexible and remember that classes are important - it's better to assign someone too little than too much

2. Meeting minutes

Meeting minutes are a record of what happened during your meetings. Most meeting minutes may include but are not limited to:
- Who is present?
- What has been accomplished since the last meeting?
- What was accomplished during the meeting?
- Who is going to do what after the meeting?
- When and where is the next meeting?
- What goals is the team working toward?

Meeting minutes help document what and when progress was made. Absent members can see what was discussed, and future members can see the history of your project. You can take meeting minutes yourself, or you can have a project member take them. This helps you focus on running the meeting, and you can even switch who does this task at each meeting.

B. Membership

1. Member Recruitment

Showcases and General Meetings are good places to make people aware of your project. See sections **E. Showcases** and **F. Tesla Works General**

Meetings for more information on these. Talk to the Communications Director if you would like to be featured on the Tesla Works Facebook or included in the Tesla Works weekly email.

2. Member Retention

Tesla Works projects must be open to anyone. This may mean that new members need to learn a lot to get caught up with your project. To start, have new members look through your project's Basecamp or Google Drive. If you've been keeping up with documentation, this should give new members a good idea of what your project has been doing. Give new members a chance to ask questions, and be able to explain your answers in as much detail as is necessary. This shows that you care about them as valuable members of your team and helps encourage them to come back.

For many projects, it's important to have business, liberal arts, design, or other non-CSE students as members. Make sure they feel comfortable with the technical jargon used and feel welcome to speak up if they don't understand something.

Some projects implement a task-based approach where members work on tasks independently or in small groups during the week, and then report back their progress at meetings. This can be a good way to get new members involved right away, but be cautious – each member may have a different idea of a reasonable amount of work to be accountable for.

C. Purchase Requests

Funding through Tesla Works can be obtained using purchase requests. This is one of the most common ways for projects to obtain money. Sometimes, projects need more money than is reasonable for Tesla Works to provide. In those instances, outside funding might need to be acquired. Grants are available through the University (see Funding in **Resources**) and the Project Director can help find other sources for your project.

Once you fill out the Purchase Request Form, the Officers will vote on whether to approve your funding. You should attend an Officers Meeting or find a representative from your project to attend for you. Having a

representative to explain what the items are for will greatly affect your chances of being approved. If your request is approved, the Purchasing Manager will contact you to complete this process and buy your items.

If, in a given situation, your project finds it best to purchase certain items or services yourselves, the purchaser may be reimbursed for any or all of these items upon approval of the Officers. This will follow the same procedure as a Purchase Request. It is possible that all or part of the reimbursement will not be approved, and this risk is assumed at the time of purchase. No reimbursements can be given without a receipt.

To submit a purchase request, fill out the Purchase Request Form. It can be found at https://finance.teslaworks.net/purchaserequest. The form contains instructions on how to fill it out and what you need to do. Be prepared to send a representative of your project to an officer meeting to explain your purchase.

Some tips for filling out the template:
- Copy and paste the item name exactly as it appears from where you're buying it.
- If you're buying multiple items from the same site, only include shipping costs once.
- For the type field you can choose one of two options: Reimbursement or Purchase
- For the categories field you can choose from the following: Electronics, Wood, Metal, Construction Hardware, Chemicals, Consumables (Fuel etc), Other – this is useful information for the Treasurer

If you have any additional questions on how to fill it out, let the Purchasing Manager or Project Director know.

D. Update Forms

Each Project is required to submit an update form to the Board of Officers two times each semester: once within the first five weeks of the semester and again within the last five weeks of the semester before final exams.

Update forms will be sent out by the Project Director a few weeks before

they are due. Even if there has not been progress since the last form, you must fill it out to let us know you're still a Current project.

The form will ask you for some basic facts about your project membership, accomplishment, and goals. Tesla Works uses it to keep track of the official status of your project and gather information for advertising. The update forms also help us keep the website up-to-date, so new potential members can see what you're up to and when you meet.

Definitions of each project status are listed below:

Current: A Current project may receive any Tesla Works resources, such as recruiting members and making purchase requests.

Hiatus: A project's status is changed to Hiatus if you fail to submit an update form on time. If you forget to submit an update form, it's not the end of the world – just submit an update form and your project will be brought back to Current status.

Archived: A project will be Archived after it is completed, abandoned, or an update form has not been submitted after three update periods. Once a project receives Archived status, remaining project resources will be distributed at the discretion of the Board of Officers. The only way its status can be changed is if the project proposal process is repeated.

E. Showcases

Showcases happen once per semester. These are an opportunity for you to present your project to the rest of Tesla Works and the public. You don't have to have a finished project, just try to have something physical to show people such as a prototype or design schematic.

Showcases are a great chance to recruit new members, so be prepared to pitch your project to people who stop by. It is highly recommended for your project to attend showcases, even if you as an individual cannot.

The Project Director will let you know when a showcase is coming up. They

will also let you know what information they need from you before the showcase. If your project cannot attend the showcase, let the Project Director know.

F. Tesla Works General Meetings

General Meetings are an excellent way to interact with the rest of Tesla Works, hear about upcoming events, talk about your project, and potentially gain new members.

At the first meeting of every semester, all the projects will be given a chance to give a very short pitch and talk to potential new members. Your project should have a representative at the first meeting of each semester. You don't have to be the representative, just make sure that someone is there.

You don't have to go to any other General Meetings, but they are always a great chance to get to know people and/or show off your project. In addition, projects have the opportunity to present at General Meetings. Talk to the Project Director if you're interested in presenting.

G. Roadblocks

1. Burnout

While we encourage you to actively participate in Tesla Works, be careful to maintain your mental and physical health. First and foremost, you are a student. It's okay to accept when things become too much and ask for help.

Here is the University's resource page for mental health: http://mentalhealth.umn.edu/stressmgmt/index.html

2. Teamwork Issues

If your project has been having setbacks due to teamwork issues, try talking one-on-one with members about it or bring it up during a meeting. Let them know that you are open for conversations. If things get overwhelming or you don't think you can handle it yourself, reach out to the Project Director or another Officer for advice.

3. Uninvolved Members

Maybe you started off the semester with a team of people ready to work but it has dwindled down to a few people who don't respond to your emails. Try not to take this personally, there are many reasons people may stop coming to your meetings. A common issue is workload - we are all students and workload tends to increase as the semester goes on. Check in with members individually to see how their semesters are going if you think this is the case.. If you think uninvolvement was due to your management skills, see section **A. Project Meetings**. If you'd like additional help, talk with the Project Director or another Officer for advice.

4. Conflict Resolution

The University offers conflict resolution services in the form of in-person meetings between the parties in question and a staff member of the Office of Conflict Resolution.

http://ocr.umn.edu/services/informal-services

H. Transitions

1. Transition to a new Project Manager

There a variety of reasons why you may no longer be able to be a Project Manager. Graduation, a busy schedule, or burnout are some of the most common. While this may be a difficult decision, projects can benefit from a change in leadership, especially if you haven't been able to devote enough time to it. Most projects experience a leadership change at some point.

First, talk to your project members. See what they want to do. If they want to keep working on the project, pass on the Project Manager title to a new person. If not, a change of project status is needed (see the end of this section for more information).

If your group chooses to continue, it's your job to select a new Project Manager. Following the selection of a new Project Manager, you must notify

the Board of Officers of the change and provide the contact information for the new Project Manager. If nobody on your team wants to take over, the Officers can ask the general membership if anyone else is interested.

The Officers will still expect you to fulfill the duties of Project Manager until a new one is appointed. Try to pass on as much information as possible to the new Project Manager. Documentation, such as meeting minutes, can be very helpful during this transition. If possible, try to remain in contact with them and offer help when they have questions.

    a. Steps the new Project Manager must take

        Whoever becomes the new Project Manager should attend an Officers Meeting to meet the people they will be getting resources from, as well as giving the Officers a chance to meet the new Project Manager.

    b. If a new Project Manager is not found

        If the departing Project Manager fails to select a new Project Manager, the Project is put on Hiatus.

        A new Project Manager may be approved by a majority vote of the Board of Officers. The project will be reinstated to Current status once a new Project Manager has been approved.

2. Change of Project Status

If your group doesn't want to continue, talk to the Project Director. They can help you figure out your next step. You will be given the option to put your project on Hiatus or Archived status (defined in section **D. Update Forms**). In order to change your project status to either of these, notify the Board of Officers in writing.

I. Safety

Tesla Works doesn't own any of the lab spaces that we use, so keep that in mind when working. Clean up after yourself and be trained in proper use of equipment. If safety is a concern, ask someone with experience, such as a

workshop manager, for help. If you need a tool that will benefit other students, ask the workshop manager to buy it. If it's specifically suited for your project, make a purchase request for it.

If your project is potentially dangerous, fill out the safety procedures template at z.umn.edu/twsafetemplate. An example of a completed template can be found at z.umn.edu/twsafeexample. The Vice President is the designated safety officer, so talk to them if you need help with this or have additional safety concerns.

In addition, the University Health and Safety department found at uhs.umn.edu can help your project with safety training and risk assessments.