MORE TIPS FROM THE TRENCHES:
BEST PRACTICES OF SUCCESSFUL PROJECTS

Introduction

Successful Office of Learning Technologies (OLT) funded projects are not the result of chance. Creativity, enthusiasm and hard work are key factors in their success, but projects also require attention to and nurturing of the process involved. The following are "best practices" which have been identified, with practical advice is illustrated by examples from the sponsors of successful OLT projects:

- Having clear goals and objectives
- Writing a quality proposal
- Tailoring the project to the learners' needs and assets
- Conducting upfront planning
- Creating and maintaining effective partnerships
- Marketing
- Fostering sustainability
- Making the most of the evaluation process

Having Clear Goals and Objectives

The first prerequisite of a successful project is to be able to articulate, in simple, concrete terms, your community's needs, the goals and objectives of your project and how the planned initiative will make a difference to your community.

"Originally it was just an idea about what we wanted to do…We first had a brainstorming session and reviewed the original ideas with staff…we had to determine that whatever we came up with would fit within the organization itself."(Volunteer Centre of Ottawa-Carleton, 2002)

Consider the following example. Your community organization mentors unemployed and disadvantaged workers in a rural area. However, you observe that your clients frequently miss opportunities for employment because they are unaware of job openings in neighbouring towns. The goal of your project is to help these individuals move to more secure employment. The objective of your project is to address this problem by teaching interested clients basic computer skills for online résumé writing and job search techniques. Groups of six participants will be taught four, two-hour weekly classes, using public access computers at the local community centre. The environment will be learner-centred and sessions will be flexible. Ongoing user support will be available to participants. The hoped for results are increased placement of clients in full-time employment and increase in clients' confidence and skills to help them participate in the knowledge-based economy.

The goal should be phrased in the form of a question to be answered by the pilot project. In the case of the example above, "Will acquiring online job search skills result in an increase in employment levels among learners?" The goal of the project complements the goals of the sponsoring organization.

In addition, the objective addresses both organizational objectives and those of the Community Learning Networks initiative. The objectives that will help to achieve these goals and the anticipated benefits to the community are clearly stated. They are expressed in terms that are: clear and concrete, measurable, attainable but challenging, results oriented rather than process oriented and time bound.

Writing a Quality Proposal

"The members of the community had already done a lot of work in articulating who they are and where they want to go. The OLT funding gave us the opportunity to act on our potential."(Upper Skeena Development Centre, 2003)

Your organization has an idea for a project that will address a need and you are ready to submit a funding proposal. Effort invested in research in the early stages will pay dividends when completing the funding application. It will be easier to complete the application after doing your background work than to research while you write.

Check the literature, learn what others are doing and saying about the issues surrounding your proposal and develop knowledge about the technologies you will use. Acknowledge and describe similar projects and point out how your project is different. Make use of the resources and tools of similar projects you discover to make the process easier and save yourself time and money.

"We looked at other learning networks to assist us in putting together a concept from the idea to a more concrete process and transform it into a doable project. We reviewed about 15 or 20 learning network experiences and we looked at how they did it and the problems they faced."(Volunteer Centre of Ottawa-Carleton, 2002)

A high quality proposal answers both the "why" (need for the project) and the "how" question. Keep your audience in mind. Don't assume that the reviewer knows your activities and strengths. Explain them briefly, especially how your project relates to your past and current work. Show that you have core competencies in the area where you are requesting funding. Don't make statements you can't prove or overstate the need. However, you should explain how your project could serve a broader community.

A well-written proposal is a priority. If the reviewer doesn't understand your proposal (the problems it intends to address, how they will be addressed etc.), chances are your project will not be recommended for funding. Refer to the CLN guidelines for information on application and assessment criteria. The OLT Web site contains a number of resources that can help make filling out the application a straightforward process and improve the quality of your proposal. OLT Project Officers are also available to provide information, explanations or guidance through the application process.

Although it may seem obvious, a successful project begins with a well-written application. Since many applicants propose similar types of projects, a quality proposal distinguishes itself from the others. Take a few minutes to proofread your proposal, ensure that you have completed all sections of the application form, check all calculations and verify that your application package is complete. Incomplete applications will not pass the initial screening process.

Tailoring the Project to the Learners' Needs and Assets

Being aware of your clients' needs, motivations and learning styles can have positive effects on learning outcomes.[i] Adult learners are typically motivated by the desire to use or apply knowledge and skills in a practical, rather than an academic or theoretical manner, and their learning style is more self-directed than dependent.

Consider how you will foster learners' sense of belonging and peer involvement in your project. A learner-centred, nurturing environment that responds to different learning styles can motivate participants, build confidence and can also foster the development of important soft skills such as communications.

Where possible, make use of the resources already available within the community of learners. Incorporate participants' relevant informal knowledge into the curriculum, including appropriate lessons from uncredentialled persons, such as elders.[ii]

Effective practice must be applied to the introduction of learning technologies as well. Technology that offers reliable and efficient access to learning content is essential, as is careful attention to the process of introducing these technologies to the learners. Complicated access has been found to reduce learner satisfaction and usership.[iii]

"Successful continuing education relies on two factors: efficient access to educational content and the instructor's ability to provide appropriate educational content at the right place and at the right time."(The Inullariit Society of Igloolik, 2003)

Research has identified a number of factors that inhibit adult participation in informal learning. You may wish to take these challenges into consideration when developing the key activities in your project: a lack of recognition for learners' accrued knowledge, negative prior experiences with school, a lack of necessary literacy or numeracy skills and inadequate infrastructure or resources.[iv]

"When I saw the course info, and accessed it on computer, I had no understanding of what I had to do. Also I am not very good on computers and have tried often to go on the computer, but still feel very inadequate."[v]

Community Learning Networks frequently serve marginalized clients, who require additional social, psychological and material support. Although not directly associated with your project, the broader context of learners' life may pose obstacles that impede

their success: lack of time, lack of financial resources, family responsibilities and lack of child care. You may want to consider mitigating these factors especially when providing services to lower income groups, women and minorities.

"I couldn't do anything at home. Every time I started to read, someone would disturb me. You're always at their beck and call."[vi]

<div style="border:1px solid black; display:inline-block; padding:4px;">**Conducting Upfront Planning**</div>

This section presents some general lessons on successful project planning. The planning process advances your project from vision to specific actions. Although the process may seem intimidating, your organization has probably successfully planned projects, such as advisory meetings or one-day seminars, in the past. You already have experience in thinking through the necessary steps to ensure success.   In addition, there are many resources available, including those on the OLT Web site, to help you plan your project.

Use the planning process to anticipate potential difficulties and build in flexibility to deal with them if the need arises. This process will take time and should involve as many of the key project personnel as possible. In successful projects, all participants understand the tasks involved and agree on the "ground rules".

While your action plan will vary according to the length and complexity of your proposed project, it must delineate the phases of the project, establish a timeframe for each action, describe the work to be performed by various staff members, assign lead responsibility for each task and allocate the technological capacity, personnel and financial resources required for all activities. The *Applicant Toolkit* on the OLT Web site contains a tutorial which breaks the process of writing the action plan down into a series of simple questions, which if answered will fulfill OLT requirements for your submission.

To function successfully as a project management tool, the action plan must be relevant, complete and understandable. As well as serving as a "road map", a good action plan also acts as a monitoring framework to measure your project's progress and alert you early if things go wrong.

Remember to budget for the time involved in effectively managing the project. While the project manager performs most of these tasks: sets and communicates goals, fills information needs, makes or authorizes decisions, reports progress, co-ordinates the team's work, liaises with project partners, and promotes the project, other key personnel often play a role in management. A rule of thumb is to allow 10% of overall project time for management tasks.

Your project will have a greater likelihood of successful completion if you build in a cushion for contingencies when allotting time to various tasks. Remember that the

project may be delayed by factors outside your control and you may face an unexpected rush to meet a deadline.

"Stay the course with the operation plan guidelines and objectives. Where you have to be flexible is in the timing. For example, we allowed only four months for the content development. It became clear that this was not enough…we had to reorganize tasks around the end dates." (Corporation of the City of Fredericton, 2003)

Make sure the financial budget reflects all the required elements of the project and don't short-change your chances of success by trying to operate without adequate funding. For this reason it is important that the estimates of labour, materials and supplies and other expenses be as detailed and accurate as possible. In addition, reviewers can usually identify a "padded" budget, and asking for more funding than can be clearly justified will backfire.

Establish when you will receive funds from various sources and when you will need to pay out cash. There may be periods when the project experiences negative cash flow. You may want to establish temporary financing for these times.

"What we have experienced to date with the project is there is a need to…effectively manage unforeseen costs and activities. In this particular project we were hoping to get the curriculum development free. This did not work out and we needed to fund it." (Corporation of the City of Fredericton, 2003)

Use your action plan to keep the project focused and maintain momentum. Plan to meet in-person on a weekly basis if at all possible. These status meetings are often the only times that the whole team has the opportunity to report progress, discuss problems and stay informed of issues that affect the overall project.

"We met almost once a week to review our plan. This was done by conference call. Individual responsibilities…were discussed at every meeting." (Corporation of the City of Fredericton, 2003)

Creating and Maintaining Effective Partnerships

The Office of Learning Technologies encourages multi-sectoral partnerships. Partners supplement your expertise, increase your access to human and financial resources, broaden the reach of your project through access to their clientele, assist with disseminating results and can ultimately help your project to become self-sustaining.

"The partnerships are important because no one organization can do it by itself especially when you develop e-learning. With these types of projects you need a multi-disciplinary team. With the current technology your partners can be from anywhere." (Corporation of the City of Fredericton, 2003)

When recruiting potential partners, seek out organizations with complementary goals to your own and whose skills, commitment and credibility will enhance your project.

It is important for potential project sponsors to do an environmental map of the community examining potential supporters, players, clients and partners. The project sponsor needs to ask the following questions. Who do I have existing relationships with that will be potential partners? What other organizations do I need to partner with to do the project? Who could we call on to support the project as potential users of the service?"(Volunteer Centre of Ottawa-Carleton, 2002)

Explain to potential partners why you are asking them to be involved, what will be expected of them and what they stand to gain by participation. Partners report a number of advantages arising from their involvement in OLT projects. They often find they acquire increased influence and credibility and are able to better advance their own organizational goals. Creative solutions often emerge from the varying perspectives that a partnership brings to bear on a common problem. In addition, teamwork helps to eliminate duplication of services and better uses limited resources, benefiting both the organizations involved and their community.[vii]

Create a shared vision of what is hoped for if the partnership is successful. Formalize your collaboration and agree on processes for making decisions and resolving conflict. A written letter of understanding is a good idea, because it requires organizations to think through the commitment that is being made and confirms a common understanding exists. A partnership is a dynamic process and you should plan regular meetings with partners to review what has been achieved, what you want to achieve next and whether the processes are still relevant or new ones need to be put in place.[viii]

"Our time changed and we had to reorganize tasks…This impacts on all the partners and their commitments, so we needed to discuss these types of changes to allow all the partners to make adjustments to their schedules." (Corporation of the City of Fredericton, 2003)

If you have worked with other groups in the past, you know that successful partnerships require both planning and ongoing effort. As the project sponsor, you support the partnership. You may want to consider offering your partners initial training or information sessions; very few people have all the skills they need to be effective in a partnership.[ix] Provide convenient meeting times and places, give partners an opportunity for real input and do not waste their time, expertise or resources. Remember that your partners have schedules, responsibilities and priorities within their organizations and can only devote part of their time to your project.

While all partnerships experience difficulties from time to time, good communications, formalized expectations, consideration and common sense will go a long way towards averting problems and make the partnership a mutually beneficial experience.

"Partnerships were key to the creation and sustainability of the Urban Black Community learning Network (UBCLN)…As awareness of the UBCLN spreads…the reach and impact of the project fosters its continual growth. Enhancements originate from the input of partners who become participants and stakeholders, making the UBCLN more versatile, useful and appealing to all who use it."(Canadian Centre on Minority Affairs, 2002)

Marketing

Marketing does not require a large budget or extravagant events. Simply know your project and be ready to talk about it from the point of view of your audience. You should be able to articulate, in simple, concrete terms, what you project is about and how the planned initiative will make a difference to individuals and your community.

Local newspapers are low-cost vehicles for promoting your organization and your project. When you write an article or press release for publication, save it and modify it according to different purposes and audiences. Don't be afraid to send the article to larger publications; well-written materials are frequently in demand. If you already have a Web site, especially one that is a regular point of contact for the audience you are trying to reach, make sure that project information and news are updated regularly.

Proven strategies to reach potential learners include: providing information for other organizations to disseminate information through their networks, placing simple posters in areas where target learners congregate (e.g. food shops, service agencies, community centres) and asking participants in your other programs to spread information by word-of-mouth within their communities.

"Initial conceptualization, proposal development and then implementation… have all been carefully documented (by us) for the benefit of other communities that are contemplating the introduction of the learning community concept…some of which are now setting up their own community learning networks."(Upper Skeena Development Centre, 2003)

Be sure to share your project results as you go along. The value of successful projects lies in part in the extent to which you disseminate your expertise, your best practices and lessons learned to the widest relevant target audience.

"Project leaders are finding that as the project develops, they are in an excellent position to help other nascent projects get underway in their partner organizations."
(The Quebec Learners Network, 2003)

Fostering Sustainability

Successful OLT projects establish new community learning networks and make them self-sustaining. OLT encourages project sustainability by requiring partners to make budgetary commitments, prioritizing learner involvement in projects and by funding the evaluation process and dissemination activities.[x] However, it is the sponsors and their partners that play the major role in both learning community viability and self-sustainability.

"Projects which described strong plans for the dissemination of results often integrated these into a promotional strategy that spanned the life of the project and included its on-going project promotion."[xi]

One important step to success is to let potential learners, organizations relevant to these learners and your potential partners know what you are doing and that their involvement would be welcome. Follow up any inquiries for information that you receive, and market your project whenever and wherever the opportunity arises.

Your organization and partners will invest a great deal of time, expertise and financial resources into a project that will benefit your community and will wish to see it continue and build, not "die", once OLT funding is discontinued. Give early consideration to relationships, practices and procedures that will support the benefits of your project to the community over the long term.

"Although sustainability is discussed more towards the end of the pilot project, at the beginning we were already thinking of how we would sustain the project. The first step to ensure sustainability of the network was to have buy-in from the staff that the project would fit into the organization's overall strategy."(Volunteer Centre of Ottawa-Carleton, 2002)

While seeking third-party funding is the first measure that most organizations consider, it is not the only option that can help sustain your project. Other possible measures include: collaborating to share overheads or resources with other organizations, incorporating project activities into other organizations with a similar mission, soliciting in-kind support (e.g. free rental space) from the local community or establishing a fee-for-service structure for certain services to generate revenue to support others. While you will choose the strategies that make the most sense for your organization, diversification is wise, protecting your project should one approach prove unsuccessful.[xii]

Making the Most of the Evaluation Process

The Office of Learning Technologies requires formal evaluation of all pilot projects. The evaluation process is designed to measure the progress of your project on an ongoing basis in order to understand its effectiveness and use of resources and to improve its

outcomes. Your funding application must incorporate an evaluation plan that identifies the processes and tools to carry out the evaluation and allocates the resources required.

"We were constantly evaluating project activities at every stage of the project. We strongly recommend to any project sponsor to start the evaluation at the beginning and make sure that it is ongoing."(Volunteer Centre of Ottawa-Carleton, 2002)

Although your organization may not conduct formal external evaluations of all your activities, you do, no doubt, monitor activities and check that funds are being used effectively to achieve your goals. The project evaluation takes this useful exercise farther and incorporates the views of sponsors, partners and clients to provide a clear view of project activities, reflect on the reasons for and conduct of these activities, identify problems, understand their causes and resolve them. This evaluative process also allows you to identify practices that are worth repeating in the context of the current project or in the future.

There are resources on the OLT web site to help you prepare your evaluation plan, engage appropriate personnel to perform the evaluation and report evaluation results. To derive the maximum benefit from the evaluation process, tailor your evaluation plan to the size and complexity of your project. Verify what information is needed before you finalize the plan, since each stakeholder will have a unique perspective on what they want to learn from the evaluation. You and your stakeholders may need to resolve how to balance costs and benefits of evaluation activities.[xiii]

Bring the external evaluator on board early and establish a cooperative spirit between the external evaluator and project staff. Project staff will play an important role in the evaluative process and will need to be kept informed. Keeping notes and documenting activities as you go will provide a great deal of the materials needed for annual evaluation and final reports.

Be prepared to make changes along the way. Periodic feedback from the evaluator throughout the duration of the project will give you satisfaction, and the opportunity to expand on your successes, if your project is working perfectly. If adjustments need to be made, you can effect change in a timely fashion. In the worst case, it will help to cut your losses in the most efficient manner. Understanding success helps you to build upon it; understanding failure helps you avoid repeating your mistakes.[xiv]

Lessons from evaluation performed in a spirit of cooperation are useful beyond the scope of your specific project. They increase the knowledge of sponsors, partners and OLT for future activities. In addition, it is vital to disseminate evaluation results beyond just the project sponsor, partners and OLT so they can be applied to the design or conduct of similar projects by other organizations.

Conclusion

We have attempted to summarize some best practices of successful OLT projects. While they do not provide a magic formula for success, we hope that they help you to achieve your project goals. We look forward to adding your experiences and lessons learned to this section in the future.

---

[i] Livingstone, D.W. "Working and Learning in the Information Age: A Profile of Canadians." 2002, pp. 52-53.

[ii] Ibid. p. 52.

[iii] Fricke, Yutta, "Balancing Product with Process: Outcomes and Emerging practices in e-Learning." 2003, pp. 17-18.

[iv] Livingston, D.W. et al. "Interest in and Factors Related to Participation in Adult Education and Informal Learning." 2001, p. 77.

[v] Atack, Lynda, "Online Training in the Workplace for Health Professionals: Developing a framework for efficient workplace training." 2002, p. 27.

[vi] Ibid. p. 36.

[vii] HRDC, "The Partnership Handbook." 2000, p. 7.

[viii] Ibid. pp. 25-30.

[ix] Ibid. p. 30.

[x] Fricke, Yutta, "Balancing Product with Process: Outcomes and Emerging Practices in e-Learning." 2003, p. 21.

[xi] Ibid. p. 25.

[xii] See the Community Toolbox at http://ctb.lsi.ukans.edu/tools/en/sub_section_main_1330.htm.

[xiii] See the Community Toolbox at http://ctb.lsi.ukans.edu/tools/en/sub_section_main_1352.htm.

[xiv] HRDC, "The Partnership Handbook." 2000. p. 40.