Community Engaged Learning Toolkit for Students

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# 1: Forming your group

## (Forming groups resource adapted from [University of Waterloo Centre for Teaching Excellence](https://uwaterloo.ca/centre-for-teaching-excellence/teaching-resources/teaching-tips/developing-assignments/group-work/making-group-contracts))

Forming groups can be a challenging exercise that balances getting to know and understand fellow group mates and agreeing to negotiating challenging tasks. This balancing of task with relationship building requires building understanding to co-develop agreements and group norms. A group contract is a document that a group creates to surface and establish the norms of behaviors and the expectations of group members.

## Group contract

Here are some important considerations when developing a group contract. There is also a sample group contract that you can use that has some specific examples to get you started. Feel free to adapt as needed by you and your group.

## Considerations

* Include group members’ names, contact information and availability for collaboration (consider work commitments, time zones etc.)
* The group contract should include agreements around time (when to meet, for how long, expectations around deadlines etc.)
* The group contract should include agreements on process (how to make decisions, how to communicate decisions, how to keep the partner up to date, the commitment to address conflict etc.)
* The group contract should include agreements over behaviour expectations (how to function as a group, how to take intentionally take on roles, how to support each other etc.)
* Be open to addressing tension or conflict as you see it happening. It is easier to have a difficult conversation earlier in the process before it negatively impacts group functioning and the project.

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| **Group Contract Template**  **Group Name:**  *These are the following terms of group conduct and cooperation that we agree to follow:*  **Participation:** *IE: we agree that assigned tasks are to be completed to by the agreed deadline. If it looks as though there will be a problem meeting a deadline, the person concerned should seek help from other members of the team in time to avoid a delay.*      **Decision Making:** *IE: we agree to get consensus on all major decisions.*      **Meetings:** *IE:**we agree to establish a regularly occurring meeting on \_\_\_\_\_\_\_\_\_ at\_\_\_\_\_\_\_\_\_ where all group members can attend.*      **Communication:** *IE: we agree that during meetings each member will take turns listening as well as talking, and active listening will be a strategy for all group discussions.*      **Conflict:** IE:*we expect that there will be disagreements and will seek to address any tension within the group as soon as possible.*      **Deadlines***: IE: we agree to develop specific tasks and deadlines after each meeting so that each group member has clarity around what is expected and when.* |

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| Team Member’s Name | Team Member’s notes on availability |
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## Group Roles

## Determining roles for group work will help with the structure and flow of a meeting or a project. These roles can be fixed or flexible and change from time to time. Below are some examples of the roles that can be assigned for meetings, choose those that are critical to your groups process.

## You can use the below template to assign and track roles for your meetings.

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| **Meeting #1**  **Date:** | | |
| **Name** | **Role** | **Role Description** |
|  | Facilitator | Leads the group through agenda building and priority setting for discussion and decision making. |
|  | Secretary/ Recorder | Responsible for taking notes on key decisions and recording action items. Provides ongoing summaries of the discussion at key points and for clarification. |
|  | Questioners/ Challengers | Will interject with questions and a questioning of assumptions to disrupt group think and enable alternate explanations and creative solutions. Assigning one or more group members to this role will ensure questions are posed at key moments throughout the discussion. |

More resources on successful group functioning and conflict resolution can be found [here.](http://learningcommons.ubc.ca/student-toolkits/working-in-groups/)

## Group Meetings

Group meetings are required to surface understanding, achieve clarity around roles and responsibilities, form agreements on the project and the process that will support the work. Here are some tips to ensure your meetings are effective:

1. Determine and be clear on the goals or desired outcomes of the meeting (agree on roles, determine a project plan etc.)
2. Ensure that every one has a chance to contribute
3. Determine a format and the questions that the group will work towards answering to achieve the goal or outcomes
4. Record action items, clearly assign tasks and determine what needs to happen before the next meeting
5. Agree on how and when to communicate (frequency/platform) in-between meetings
6. Circulate minutes (decisions, tasks, deadlines roles etc.) after the meeting

Here is a link to a [sample meeting agenda](https://docs.google.com/document/d/1usRr5PixQRJ2WM50z7oAOCkyI7uDAwmTljcsUeRfjsA/edit?usp=sharing) that you can use for your group meetings.

# 2: Researching your community partner

Conducting preliminary research about the partner organization ensures you are able to begin your relationship by asking questions that will elicit meaningful and useful information that can build on what you find online. For example research enables you to shift from asking, “What is your mission statement?” to asking, “I looked at your mission statement online and it states…..how do you think this project will align with your priorities?”

Beginning from a place of mutual respect will set a strong and positive tone for the partnership. Before communicating with your partner the first time, the group should have a preliminary understanding of the following:

* The mission, vision and values of the partner organization
* The social context in which your organization is working in and what that means broadly at local, national and global levels (IE: food security)

# 3: Communicating with your Community Partner

## Guidelines for Professional Email and Phone Communication

### Email

* If you are working in a group it is necessary to assign a primary contact person to manage project communication with your community partner.
* Use your ubc.ca email address. Pay attention to make sure your name is displayed in the “from” field, and not an old nickname you may have forgotten about.
* Always fill in the Subject field with content that is descriptive, clear and concise, such as “Re: UBC (Faculty and Course) – Group Project X.”
* Format the email in the same way that you would format a letter. However, brief is better. Use bullets to delineate points and/or questions. Always use proper grammar, punctuation, capitalization, and spelling. Do not use emoticons, abbreviations, or other symbols.
* Preferably, each email should have only one subject, consistent with the subject line. If there are two or more issues/questions in an e- mail, be sure to include a quick summary at the beginning of the message.
* Begin your e-mails with a proper greeting, such as “Hello Mr./Ms./Dr. X”. Do not use terms such as Sir, Madam, Miss or Mrs. Sign your e-mails with your full first and last name (and include the names of the other group members and their roles as applicable).
* When replying to a message, refer to past correspondence so that the recipient is clearly reminded of the issues and topic of your message.
* When using the “CC” function please make sure it is clear as to *why* and to whom the partner should respond. Example: “I have cc’d my teammate *NAME* as she will working on our project schedule. If you have any questions please reply to me and CC *NAME* as I will be managing the project communications.
* It is never appropriate to use the BCC function.
* Be patient for a response. Your community partners are likely very busy. If you do not receive a response after 3-4 business days, call your community contact directly and leave a voice-message. If you do not hear back again after 2 days, notify your Teaching Team point person (Professor, Teaching Assistant Etc.).

### By Phone

* Start with a proper greeting, such as “Hello Mr./Ms.”. Do NOT use terms such as Sir, Madam, Miss or Mrs.
* Introduce who you are, the course that you are in, and the purpose of your call.
* If you are requesting a meeting or orientation, have your agenda or schedule ready before you call.
* Prepare a set of documents, plans etc. that you can send out as an immediate follow-up if your partner is requesting / needing more information.
* Be prepared to provide contact information such as an e-mail address or phone number.
* If you are leaving a voice message, speak clearly and slowly. Provide a contact number or email twice – at the beginning and end of the message. Briefly note the time you are calling and the subject of the voicemail. Voicemails should not last more than one minute.

**Virtual Meetings**

* Mute your microphone when you’re not talking. This helps prevent distracting background noise (including note taking by typing).
* Dress appropriately.
* Be aware of your surroundings. If possible, ensure your back ground has decent lighting and is free from distractions.
* Try not to bring food into the virtual meeting.
* Stay focussed and avoid multi-tasking.
* Prepare materials in advance. If you will be sharing content during the meeting, make sure you have the files and/or links ready to go before the meeting begins.

## (Adapted from [University of Pittsburgh](https://www.technology.pitt.edu/blog/zoom-tips) and [York University Student CSL manual](https://community.info.yorku.ca/t-and-l/))

## Developing an Agenda for the First Meeting with Your Community Partner

## Your first meeting with a partner should include prioritising a balance of attending to the relationship as well as the task. This means developing an agenda that focusses on:

## Getting to know each other and building the relationship

## Getting clarity and agreement around the goals of the project or collaboration.

## Deciding how you want to work together and what are the expectations around communication

**Here are some things to consider when getting to know each other:**

* Introductions could include adding why you are interested in working on this project/ working with students (what motivates you, inspires you etc.)
* Discussion around what everyone is hoping to achieve through this collaboration
* Asking how they got into this area of study/work and why it is important to them

**Considerations for working through the project goals and deliverables:**

* Although you have conducted preliminary research and reviewed the course documents that outline the project it is important to review project goals. It will be especially enlightening to hear from the partner about the “why” of the project. Meaning why the project/collaboration is important to them and how it fits into the bigger picture and supports their work.
* It is equally important to review the intended deliverables of the work and get clarity on the expectations around what should be developed and delivered and when.
* Establishing key milestones and timelines together at the beginning of the project will help with project communication and provide opportunity to adjust as needed as the project progresses.

**Considerations to determine how to best work together:**

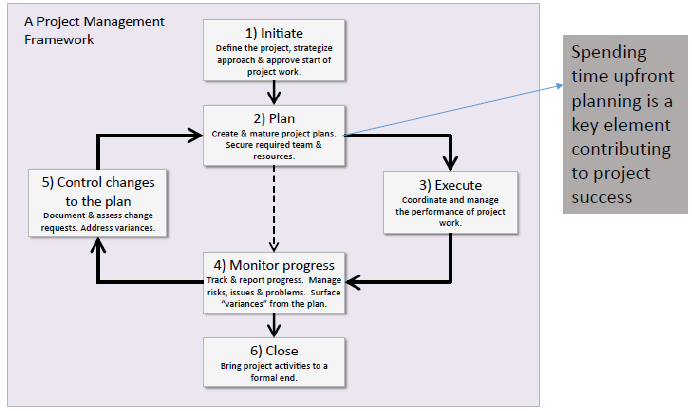
* After clarifying what to do it is important to agree on how to do it. Project work is iterative and requires very clear communication.
* Determine the type and frequency of communications with and to your partner (examples: video-chat or email) and how often you should check in and provide an update on the work.
* Open up the conversation for how to best deal with challenges that will occur along the way.
* Use the available project scoping and management tools as ways to communicate progress and timelines.

You can use [this sample agenda](https://docs.google.com/document/d/1kWu3gz_yEPtHRUHjItYQ2Qoec508evgVh8UZEjtlmJo/edit?usp=sharing) to get you started.

# 4: Project Planning and Management Tools

Project planning, and management are key to the effectiveness of team projects. They are also especially important when working with outside organizations to help clarify expectations and provide insight when making changes throughout the project lifecycle. Being proactive in setting the project scope will contribute to clarity on goals, deliverables, activities, timeline, roles and resources. All of the project details should be captured in a project plan, which will be used to guide the project implementation and can be referred back to and modified as changes arise.

Below is a Project Management Framework that lays out the project lifecycle:



## Developing a Project Plan

Setting the scope of the project is the first step in planning and establishes the boundaries of the project. Establishing the scope of the project provides a strong foundation for managing a project as it moves forward.

The project plan is the key document that defines your team’s approach and the process your team will use to manage the project to scope. It includes all of the key information that was determined in the project scoping process: specific project goals, deliverables, tasks/activities, timeline, roles or responsibilities of each team member, and budget/other resources. The plan will be used to guide the project implementation and can be referred back to and modified as changes arise.

***Sample Project Plan template***

1. **Overview**

***Project Overview prompting questions***

* What is the priority/issue/challenge that we hope to address through this project?
* Are there policies that are relevant to the project – at an organizational level? At a sectoral or governmental level?
* What are the expected outputs or deliverables of the project (e.g. research report, communications materials for a website/social media, strategic plan, campaign materials, workshop curriculum, fundraising event plan)?
* What is the timeline for the project? What are key dates or milestones within project?
* What kinds of activities/tasks will be required to complete this project? Will we realistically be able to complete all of these activities in the allotted timeframe?
* What mechanisms can be created to ensure the project stays on track?
* What can your group learn from relevant literature or studies? What is comparable to your context? How is your project different? What methods can you adopt and modify to suit your context?

1. **Vision, Goals, and Objectives**

The vision should come from your community partner. It will likely be long-term and this project will be one part of fulfilling the vision, whereas the goals and objectives should be short-term in nature and achievable within the project timeline.

* Goals are broad primary outcomes – you will likely only have one goal for this short-term project.
* Objectives detail the measures you’ll take in order to achieve the goal(s). They should be SMART: Specific, Measurable, Achievable, Realistic, Time-Bound.

1. **Scope**

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| Include Deliverables (what will be developed, created or delivered) |

1. **Schedule**

-Include activities and deliverable due dates

-Gantt Chart (in Excel) is a useful format

1. **Team Roles / Org Chart**

Roles and responsibilities of each team member (e.g. project manager, communications liaison with community partner, research manager), as well as the community partner (e.g. supervisor; communications manager).

***Team Member Skills and Roles prompting questions***

* What particular skills will be required of us (e.g. graphic design, videography, language, curriculum development, coding)? Do our team members have the right skillsets to accomplish the project deliverables?
* What are the major roles/responsibilities that need to be delegated to team members (e.g. project manager, communications liaison with community partner, research manager)?

1. **Budget / Resources**

-Include budget, if applicable

-Include other necessary resources (in-kind, human, etc.)

1. **Appendices**

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| -Include a section on Assumptions:A list of the key assumptions your team has made in project planning, e.g. availability or skill of people, availability of resources, etc. -Other appendices as applicable to the project |

## Project Scheduling

An essential part of the project plan is to plan a timeline for the project to keep track of the schedule throughout the project lifecycle. It includes a timeline of discrete activities/tasks and notes deadlines for key deliverables/milestones, as well as listing who is responsible for each activity/task for accountability purposes. Here is an annotated [project scheduling template](https://drive.google.com/file/d/1k4N-6QIApm5DDBISXJ4SM0funiXqTQLq/view?usp=sharing) for you to use to manage progress throughout the lifecycle of the project and serves as both an internal and external management and communications tool.