



VENTURING · BSA®

# Project Management for Crews Facilitator Guide



SCOUTING U  
Learn. Challenge. Lead.™



## PROJECT MANAGEMENT FOR CREWS

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# COURSE INFORMATION

## Learning Objectives

- Define common project management terminology.
- Explain what a project is, and how to organize one.
- Apply project management skills in a Scouting situation.
- Interpret team dynamics to further the aims of a project.
- Design budgets and timelines that support the goals of a project.
- Explain the necessary processes to accomplish a project successfully.
- Explain the value of sustainability in the project management process.
- Explain the value in collecting feedback to improve future projects.



## Time Frame

- Approximately 3 hours.



## Materials Required

- Flip charts, whiteboards, or other means to record participants' answers during discussions.
- Copies of Appendix B for each participant (optional: copies of other appendixes).
- Sticky-notes.
- Paper and pencils for each participant.



## Delivery Method

The material is delivered through lecture, discussion, and breakout sessions. The location can be any available setting that allows for comfortable learning and can accommodate the size of the group.



## Class Composition

A class should be composed of less than 30 members, divided into smaller teams for breakout activities. The course should be taught by youth leaders who have experience planning large projects (example: have earned their Summit Award, served as activity chair for a major outing, etc.). This training is designed to be given at the unit level, but can be adapted for council level training if necessary due to limited crew resources. Additional facilitators may be assigned to help with group discussion.



# INTRODUCTION

**Time: 30 - 40 minutes**

## Learning Objectives

As a result of this module, participants will:

- Define the nature of a project.
- Practice selecting a project.
- Utilize appropriate terminology.



## Defining a Project

Venturing is characterized as a program designed for older youth to grow in experience in the areas of adventure, leadership, personal growth, and service. As a part of this, Venturers are often asked to provide leadership for an adventurous event or a service-related activity at some point during their Venturing journey. In order to ensure the activity will be successful, it is important to utilize proper project management techniques.

Project management is the application of skills, knowledge, and resources to accomplish a task or complete a goal. A project does not need to be permanent, and could be as small as organizing a local food drive or assisting with the promotion of a camp out. Inversely, a project can be very large and consist of dozens of volunteers investing a significant amount of time to ensure its success.

This training will prepare Venturers to identify, plan, and execute projects in an efficient manner, while encouraging personal growth and development. Throughout this course, there will be opportunities to reflect on content, apply learned skills through activities, and discuss alternate methods of accomplishing goals, with the goal of ensuring that participants are able to apply their knowledge to a diverse array of situations.



## Discussion

Lead participants in a discussion about the nature of a project, asking them some of the following questions to prompt conversation:

- What is a project? What is not a project?
- What have been some examples of projects that you have worked on?
- What makes a project successful?
- Why do you think that there is no clear definition of what constitutes a project?
- How can a project impact individuals? Communities?
- When is it acceptable to say that a project is completed or done?

The conversation should be relaxed, with maximum input from participants. If not all questions are asked or answered, ensure that at a minimum the discussion touches on the following points of emphasis.

- A project can be any event, activity, structure, or process that benefits a person or group of people.
- A project is guided by a set of goals, and is inspired by a perceived need or a passion.
- A project is not necessarily permanent, however, it must be “durable”, meaning that it must last for its defined period of existence in a sustainable manner.
- In the abstract sense, a project must have a beginning and an end, in addition to yielding distinct or unique products. These products may be tangible or intangible.
- A project can be considered successful if it accomplishes its stated goals.
- A project can impact an individual by providing a tangible benefit, such as a physical good or product, or by providing a positive experience, such as the feeling of having helped out those less fortunate than you.
- Likewise, a project can benefit a community by providing an opportunity to unite the community behind an idea or passion, as well as through a tangible good or product.



## Terms

It is important to understand the roles of each person involved in a project.

- **Project Manager:** Person in charge of the project. They are the driving force behind the planning, implementation, and personnel coordination throughout the project.
- **Stakeholder:** Person who has an interest in the project; they are directly impacted by the results and care about how the project is completed.
- **Sponsor:** Person who pays for the project, or is the primary donor of material resources.
- **Team Members:** Those who help with the implementation of the project.
- **Vendor/Third Party:** Outside entity providing a product or service to be used in the project.
- **Beneficiary:** the primary person who benefits from the completion project.

As an example of these terms being used in a project, consider a Summit Award project to create a prayer garden for a local church.

- The **beneficiary** would be the church (a beneficiary does not necessarily have to be a single person; it can be an organization).

- The **project manager** would be the Venturer pursuing their Summit Award.
- The **stakeholders** would be the church parishioners who would use the garden in the future.
- The **sponsor** would be the person who donates money for the supplies needed for the garden. This could potentially be the same person/organization that is the beneficiary, but could also be a separate donor.
- The **team members** would be all those who help build the garden.
- The **vendors** would be people such as a contractor who pours concrete for a sidewalk, a gardening store that transports truckloads of soil, or an arborist who gives recommendations for ideal trees to be used for a particular location.



## Guidelines for Selecting Projects

When it comes time to select a project concept, the task may seem daunting. However, begin by considering the purpose of the project. What are the overarching objectives or goals you would like to achieve? These objectives can be things such as providing a fun event for your crew, helping those affected by a hurricane, modernizing a particular elementary school, etc.

Once you have a general idea of what you want to accomplish, consider more specific projects that will fit that need. In our previous examples, these specific projects may be planning a weekend ski trip for your crew, gathering hurricane-relief supplies to send to the Red Cross, and painting the walls of the school's main hallway.

Ensure that your project concept follows the guidelines for being a true project. Remember that it does not necessarily have to be permanent; however, it must be “durable”, meaning that it must last for its defined period of existence in a sustainable manner. In the abstract sense, your project must have a beginning and an end, in addition to yielding distinct or unique products (which may be tangible or intangible).

At a later point, you will craft a project scope statement, which will solidify this project concept into a defined, achievable plan. For now, however, just think about overall goals and objectives for your potential project.



## Team Activity

Divide participants into small collaborative teams. They will break out into these same teams at various points throughout the training, so it may be helpful to encourage them to sit together throughout the lessons. During this first breakout, ask them to decide on a hypothetical project theme; as they progress through the following lessons within this training, they will be applying the project steps they

learn to plan this hypothetical project with their team. Ensure that they choose a realistic and specific project that they may encounter, such as planning a certain “Tier III” Venturing super activity, planning a service project for their chartering organization, starting a council Venturing Officers’ Association, etc.

Once they select a project, ask them to first discuss why it qualifies as a project. They explain what impact their project will have, and why that is a needed aspect of the beneficiary’s operations. Then, they should discuss which persons/organizations would fall into each of the project roles (beneficiary, sponsor, stakeholders, possible vendors, etc.). Each team should then briefly present to the whole group a summary of what they have discussed.



## Review

Evaluate participant understanding of the following points:

- What is the definition of a project?
- What qualifies as a project?
- Who is responsible for the execution of a project?





# PLANNING

**Time: 45 minutes**

## Learning Objectives

As a result of this module, participants will:

- Explain the value of documenting service hours.
- Apply the Planning Process.
- Explain the process of forming a project budget.
- Practice planning skills in a project context.



## Logging Hours

Documenting your project is very important. The foremost reasons for documenting any process is that it reduces confusion and also allows you to quantify the effort required for a specific task. These documents act as the database of organizational knowledge throughout the duration of the project, and the stored information can be accessed in the future by others.

It is recommended to log all project hours, including the ones used in the planning of the project. These can be used for:

- **The core Venturing awards:** service hours are required for the Discovery, Pathfinder, and Summit Awards. These service hours should be tracked by the individual Venturers as they progress through the recognition system.
- **Journey to Excellence:** these hours can be entered by a representative of the crew (usually the advisor or president) at <http://www.scouting.org/scoutsource/Awards/JourneyToExcellence>.
- **Messengers of Peace:** this international program tracks service projects around the globe (<http://www.scouting.org/messengersofpeace.aspx>).
- **Future projects:** others looking to plan similar projects in the future can use your records as a resource or aid when planning their own project.

When logging hours, Venturers will need the following information:

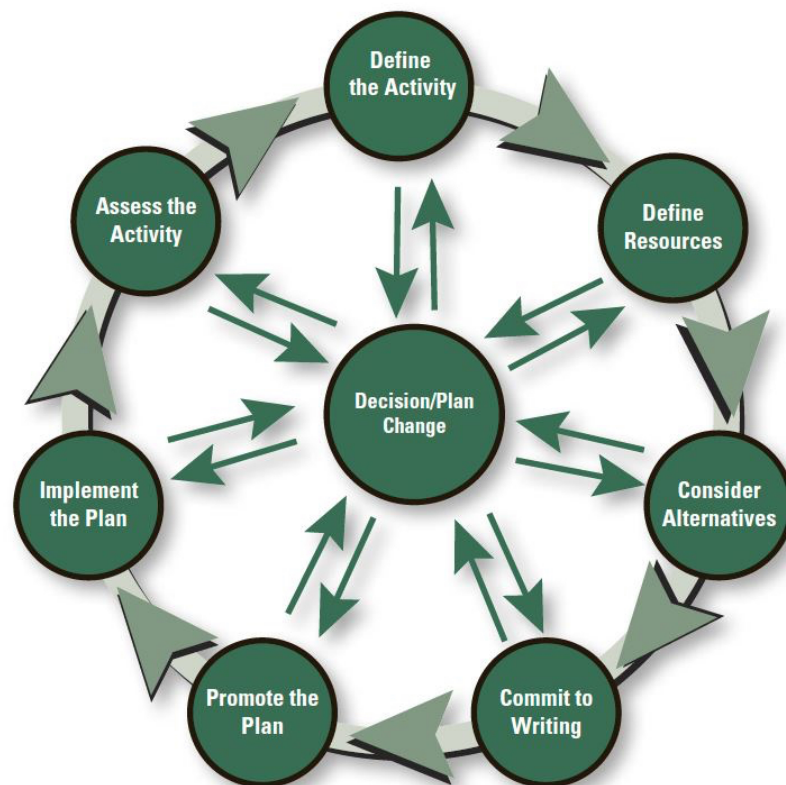
- Basic project description.
- Date of the project.
- Number of people participating (may be broken down into categories of Scouts vs. non-Scouts, youth vs. adults).
- Total hours worked.



## Planning Process Steps

We will begin by giving an overview of the steps you will take during the planning process, and then go through each step individually in more detail, and give you the chance to practice on your team projects.

1. **Define the Activity:** The first step of planning a successful project is deciding “*what exactly do I want to accomplish?*”. Talk to key stakeholders, donors, and sponsors to get an idea of their needs and expectations, and what your project should entail.
2. Next, **Define Resources:** This conversation with key stakeholders, donors, and sponsors will give you an idea of what materials and services they are willing to provide, and you will determine what other resources you will need to gather from other sources. This step includes the beginning of a *project budget*.
3. Next, identify and **Consider Alternatives:** List out some specific tasks and determine if there are other options that will allow you to be successful in your project.
4. Next, **Commit to Writing** by creating a *Scope Statement*. This will finalize and record the details of what precisely the project will cover, including an *estimated timeline* for each project component. This will get everyone on the same page, and reduce the chances of costly miscommunications, while holding the project to a schedule.
5. Lastly, **Promote the Plan** by communicating the timelines of the project to members of the team. This can also include *presenting the plan* to key stakeholder, sponsors, or beneficiaries for approval.





## Scope Statements

Creating the Scope Statement is arguably the most important part of the planning process. It is the foundation for the rest of the project, always guiding you towards the desired purpose. The Scope Statement clearly defines what the outcome of the project will be; it is an agreement of goals between the project manager, the sponsor, and other stakeholders. Through this, it decreases the chances of miscommunication.

To create a scope statement, begin by gathering a list of project needs. Talk to key stakeholders, donors, and sponsors to get an idea of their needs and expectations, and what your project should entail. These should then be prioritized and narrowed down into a set of specific project goals. These should outline the objectives of the project — the benefits you hope to accomplish.

SMART goals help to break down the planning process to ensure that your goals are achievable. SMART goals are:



- **Specific:** Are the goals clear in scope and detail? Are they too vague?
- **Measurable:** How can it be determined that the goal is accomplished?
- **Attainable:** Is this goal realistic?
- **Relevant:** Does this goal help achieve the broader aims of the project?
- **Timely:** Is this goal being achieved in the correct order? When will it be finished?

The final scope statement should include:

- The primary objective of the project: what need are you trying to fulfill, or what problem are you trying to solve?
- The benefits of and justification for completing the project.
- The project scope; state which exact tasks will be included in the project (remember to keep your goals “SMART”).

Two example scope statements can be found in **Appendix A**.



## Team Activity

The purpose of this activity is for participants to understand that all parties of a project should have the same information in order to be active and productive members of the team.

- Present each participant with a copy of **Framework Activity Page 1 (Appendix B)** face down.
- **Say:** “This piece of paper has the numbers 1 through 54 on it. I need each of you, when I tell you to flip this piece of paper over, to locate each

number in order (i.e. 1, then 2, then 3, etc.). I will give you 30 seconds to complete this task.”

- Ask for questions. It is common for participants to think that numbers are missing. Should this arise, inform them that every number is listed and that this activity can be accomplished.
- Tell the participants to flip over their pieces of paper and give them 30 seconds to complete the task.
  - Note: after the 30 seconds is up, have the participants flip their piece of paper back over as to not allow the participants to continue looking for the next number.
- Once complete, ask if the group found...
  - Numbers 1-10? 11-20? 21-30? 31-40? 41-50? 51-54?
  - If they want another chance to play?
- Provide them with another opportunity to complete the task. Ask the group if they improved, and if they did, ask the group to shout out their highest number found.
- Ask the group if they struggled at all and solicit their frustrations. Note: lead the group down the path that there is not a pattern to the numbers. Once this point is brought up; tell the group “There is a pattern! Can’t you see it?”
- At this point provide **Framework Activity Page 2**. Point out that number “1” is in section one, number “two” is in section two, and so on. Remember to point out that number “10” is in section one, and so on.
- **Ask:** “How did you not see that? Aren’t we all looking at the same page?”
  - Allow the group to vent frustrations, but look for the fact that the facilitator knew the answer and did not share it. If this point does not come out, ensure that it does.
- **Ask:** “Why is it so important for everyone to be on the same page?”
  - Answers should include consistency in execution, stages of team development, and for fairness.
- **Ask:** “So then why did we play this game?”
  - Ensure that the discussion gets to that project management requires many people doing many things, and if the group is not aligned from the beginning, each member of the group can end up in different places at the end of the project.
- If time allows, have the group play the game again with their new level of understanding. Ask the group if they improved their level of success from their last two times playing.



## Budgeting

There are two possible ways to approach creating a budget that will we discuss:

1. **Top-down approach:** defining a set total project cost and dividing that amount between the tasks.
  - For example, this method could be used in a scenario where your team receives a set donation amount from a sponsor in order to design a specific project, and you must decide how to utilize the funds.
2. **Bottom-up approach:** estimating the total cost of the project by adding together cost estimates of the project components.
  - For example, this method could be used when planning the budget for a trip, by adding together the individual estimates of costs for housing, transportation, food, etc.

Both methods have advantages and disadvantages. However, in both cases, it is important when planning the budget to use your resources to get the most accurate estimates possible. This can be done by consulting others who may have more expertise in estimating the cost of specific tasks/items, or doing outside research on the cost of similar tasks/items.

There are also multiple types of costs that need to be taken into account.

1. Many items will be **one-time costs**, and you will only need to consider the current price for that item. In the previous example of building a prayer garden for a church, this could include things such as shovels or benches.
2. However, projects that span over longer periods of time may have aspects that are **recurring costs**. In our example, recurring costs may include things such as sidewalk maintenance or re-planting flowers each year. It is useful to discuss with the project beneficiary whether they are willing to provide for these recurring costs in the future, or if you need to account for them in your budget.

Now that you have begun to think about the components of your budget, it is time to formalize your thoughts.

1. Begin by creating a written list of each project task/component, making it as comprehensive as possible. A spreadsheet may be useful in organizing your thoughts, or dividing items into categories.
2. Next, go through the list and assign a cost to each individual item; depending on the approach you use (top-down or bottom-up), either begin with the total budget and divide it up, or begin by estimating each item and adding them together. Don't forget to add in any sales tax or other taxes that are not already included in your individual item estimates. Keep in mind that some items may not have a direct cost.

3. It may be helpful to add in some “leeway” to your total budget, to compensate in the case that an item/task ends up going over the cost that you originally estimated. This can be done by adding in a certain dollar amount or percentage to the total budget.

Two example budgets can be found in **Appendix C**.



## Team Activity

Break out into teams, and present the following scenario to each group. The objective of this scenario is for each group to determine a registration fee for a sample event given certain information about event expenses.

**Say:** Imagine that your Venturing crew has volunteered to run a week of day camp for Cub Scouts in your district.

- The maximum number of participants is 120.
- A program area of a local state park has been booked to use as the location of the day camp. In this area, you are provided with a building – the park’s nature and ecology educational center – two pavilions, and an activity field. The cost for the week is \$1,100. You have the space from 8am to 5pm each day of the week.
- Scouts will be able to get to use the park’s pool for one day during the week, but at a cost of \$10 per Scout.
- Scouts will bring their own lunch each day. Activity equipment will be borrowed from the park at no cost.
- The theme for the week is Planes, Trains, and Automobiles. On Thursday during the week, you’ve arranged, through a friend who is a doctor, to have a local life flight crew land a helicopter in the activity field. Scouts will get to explore the helicopter and learn about life flight operations. The crew requires \$500 to cover expenses.
- You will advertise the day camp via mailers to each family with a Cub Scout in your district. Mailing and printing will cost you \$80.
- Your local council has given you a \$250 stipend to get you started with planning this day camp.
- If your crew wants to make a profit of \$1,000, and assuming you reach your maximum participation of 120 Scouts, how much should you charge as a registration fee?

**Trainer Tip:** If you’d like, give each group a different maximum attendance and net profit number, so that each group has to come up with a different registration fee. It is recommended that you provide the scenario to each group by projecting it on a screen, writing it on the board, or providing print outs.

**Answer** (for given scenario of 120 Scouts and \$1,000 profit): **\$30.25**

Income			
Item	Income per Scout	Scouts	Total
Registration Fee	\$ 30.25	120	\$ 3,630.00
Stipend			\$ 250.00
<b>Total Income</b>			<b>\$ 3,880.00</b>

Expenses			
Item	Expense per Scout	Scouts	Total
Pool Fee	\$ 10.00	120	\$ 1,200.00
Facility			\$ 1,100.00
Life Flight Program			\$ 500.00
Mailing and Printing			\$ 80.00
<b>Total Expenses</b>			<b>\$ 2,880.00</b>

<b>Net Profit</b>			<b>\$ 1,000.00</b>
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Once groups have determined their registration fee, consider the following discussion questions:

- What information in the scenario was necessary to determine your final registration fee? What information was not necessary?
- What tools could be helpful when trying to calculate the fee to charge?
- If you did not know the exact amount of an expense you expected to incur at this event, how would you go about making your best projection or estimate for that expense?
- If you did not meet your expected number of 120 participants, how would this budget change?
- Where could your crew turn if it needed more money to make this event happen?
- Your budget represents a plan. How can you be sure that your crew is sticking to its plan while the event is actually being carried out?



## A Project Plan

The project plan is a set of living documents that provide a roadmap for the project; the original course is set by the project manager, but it can be expected to change or adapt over the life of the project as new challenges or complications arise. The plan should gather together the scope statement, timeline, and total budget. It will then be used throughout the course of the execution of the project to determine whether or not it is still on track for completion.



Assembling a project plan can be difficult with a very complex project. A tool that can simplify this, however, is the Summit Award workbook; even if the project is not a Summit Award project, there are a number of tools in the workbook that are useful to all projects. The workbook can be downloaded from [venturing.org/summit-award.html](http://venturing.org/summit-award.html), and contains tools for budgeting, goal setting, and more.

This plan can either be formal or informal, depending on the nature of the project. In the case of a smaller scale project, such as planning an evening outing for your crew, the project plan may simply be an informational email sent to all those involved. However, larger scale projects require more complex plans; these plans may be required to receive certain approvals before execution can begin, such as in the case of a Summit Award project. Approvals may be needed from the beneficiary, sponsor, or stakeholders, and may consist of reviewing the budget, specific job components, or recruiting certain members to the team.

It is also necessary to determine who needs to be kept informed throughout the next stages of the project. Who needs to see progress reports, on what subjects, and how often? Which changes to the project plan will need to be approved, and by whom?

Once you have completed your project plan and gathered all necessary approvals, it is time to start building up your team and getting the implementation of the project off of the ground!



## Review

Evaluate participant understanding of the following points:

- What are the steps of the planning process?
- Why should a project manager track service hours?
- How do project managers create a budget?





# MANAGING RESOURCES AND PEOPLE

**Time: 45 minutes**

## Learning Objectives

As a result of this module, participants will:

- Explain how to acquire resources for their projects.
- Discuss how to motivate a team.
- Practice good communication skills.



## Sourcing Materials

While sometimes a project manager already possesses some of the resources required for a project, oftentimes they will have to gather materials from other sources. A **material** can be defined as any item or resource, tangible or intangible, which can be used to help accomplish the goals of the project. During the planning process, you should have determined what resources could be provided by your sponsor, beneficiary, and stakeholders. However, if there are resources that they are unable to provide, you will have to determine other means to gather the materials.

The process of researching and collecting materials is known as “**sourcing**”. Once material needs have been identified in the planning process, the project manager should determine appropriate methods for acquiring those materials. This may be as simple as going to a store and purchasing the necessary materials, or may be as complex as having to reach out to a manufacturer to secure custom products.

Regardless of the relative complexity, there are several considerations to be aware of during the process of sourcing your materials:

- **Cost of the Materials:** is there a cheaper option available?
- **Location of the Materials:** is there an option that is more convenient to acquire?
- **Production Conditions:** is the material produced according to a code of ethics?
- **Material Sustainability:** will this material last the duration of the project?

Answering these questions is an important element of appropriately researching your materials before acquiring them. The phrase “measure twice, cut once” is useful to consider; putting more work into researching the sourcing of your materials will make the actual acquisition process quicker and less prone to mistakes.



## Handling Donations

A project manager may determine that certain materials could be acquired through donation. The following steps should be taken when attempting to solicit donations for your project:

1. **Determine the reason for soliciting donations.** Is it financially beneficial? Is it for convenience?
2. **Determine the best method for communicating.** Tailor your communications to your audience; what demographics are you targeting? Consider the forms of communication that are most effective when contacting that particular age and profession.
3. **Identify and reach out to potential donors.** Make of list of people to contact, and then contact them using the appropriate method determined in the previous step.
4. **Collect donations.** Collect donations as they are made available to you; it is important to keep an organized log of all donations received.
5. **Follow through with donors.** Thank donors for their contributions to your project, and specify how their assistance has helped contribute to the project. Return any materials that were donated to you as a loan.

Fundraising applications, which can be found in the Summit Award workbook on [venturing.org/summit-award.html](http://venturing.org/summit-award.html), should be used if a Venturer is soliciting donations for money or materials to fund their project. This application is required for Summit projects that use fundraising, however, it is recommended that any project that will be fundraising use this form to clarify the scope of their efforts. These applications provide a necessary supervision of the fundraising efforts to allow the unit and council to determine if fundraising is truly necessary for the project. This application is not required for donations from the project manager, their family, the beneficiary, the unit, or any of the families of unit members.

Not all resources are physical materials, however; recall that a resource may be tangible or intangible, such as knowledge or skills necessary to accomplish a project's goals. It may be helpful to solicit help in training members of a project team, or recruit qualified experts to help manage specific aspects of the project. The same general process outlined above should be followed; first reach out to the vendor identified that will provide the knowledge/skills, then implement the training, and finally follow up by thanking the vendor.



## Team Dynamics

Working with a team can often make a project easier to implement and plan. The relationship of these supporting people to the project may involve a high level of commitment or investment, such as financial supporters or those who have given significant time to the project's success. However, others may have a much smaller involvement, such as people who may not be fully interested in the project's goals, but still want to contribute.

The key to managing a group of people, especially groups of diverse backgrounds or levels of involvement, is understanding what motivates them. These motivations can often be as diverse as the group that you are seeking to lead. Common motivations may be:

- **Recognition:** volunteers want to be recognized for the work that they've done.
- **Giving Back:** volunteers may be motivated by the knowledge that they're making a positive contribution to society.
- **Responsibility:** volunteers may feel a sense of obligation to complete a project.

Once these motivations are identified, be sure to target specific actions or rewards to provide your team members. Examples of these actions can include giving personalized thank-you notes to members of the team to recognize their contributions, or empowering team members to take on new positions of responsibility and leadership within the project.



## Discussion

In the small teams that were previously formed, have participants brainstorm what traits make someone a good manager of people. The traits that the small teams discuss should be listed out, and then considered by the whole group. Some of the following traits should be featured in the conversation; however, the group may identify other valuable characteristics of a manager that should also be emphasized.

- Good communication
- Well organized
- Knowledgeable about the project
- Team player
- Hardworking
- Adaptive or flexible

The dynamics of a team can often seem complex; however, an understanding of motivations can clarify many conflicts. Conflicting motivations of team members can make managing the team difficult; the manager should actively work to be aware of any potential conflicts that may arise. When considering these areas of conflict, the manager should consider the strengths and weaknesses of team members and how they will relate to achieving the project's goals. Managing a team starts with values, especially those of fairness and hard work. If a project manager is able to express their passion for the goals of their project to the team, motivating those team members can become easier due to their understanding of the project's impact.



## Team Activity

Within each team, have the participant that has been a noticeable leader of the group (e.g. contributing most of the ideas, encouraging others to be more active, leading the planning, etc.) become a silent observer of this activity. As the facilitator, inform each team of a previously unknown challenge to their plan. This challenge should be something that was not previously planned for by the team. Examples may include a surprise expense, a new requirement from the beneficiary, or other obstacles.

Without the aid of their previous leader, have each team resolve the new conflict and report on their results and process to another team. The facilitator should observe these processes and give feedback to the whole group, as necessary. Once the activity is done, the facilitator should explain the following concept.



The Stages of Team Development is a model to explain the changing dynamics of a team as new members or more information is added to the group. The four stages are: **Forming** (High Enthusiasm/Low Skill), **Storming** (Low Enthusiasm/Low Skill), **Norming** (Rising Enthusiasm/Rising Skill) and **Performing** (High Enthusiasm/High Skill).

The Leading EDGE model applies the instructional EDGE practices to the Stages of Team Development to facilitate the growth of new leaders. Each component of the EDGE model aligns with a stage of team development: **Explain** - Forming, **Demonstrate** - Storming, **Guide** - Norming, **Enable** - Performing. By varying the level of support given to each team, a leader is able to foster new leadership in a healthy way.

The Leading EDGE Model is based off of the Stages of Team Development. This is not a linear concept, however. As seen in this activity, the leadership of a group can change with different circumstances, and this can impact how a group should be led and motivated. In these circumstances, it is not unusual to see regressions in the stage that the team occupies; a team that is Performing may return to Storming if the leader is not able to complete a task effectively. This feature of Team Development is a normal one of which managers must be aware. The project team may seemingly skip the Norming stage of team development, only to return to this stage at a later time. Project managers should be prepared to adapt their leadership style a number of times throughout the duration of a project to ensure that the needs of the team and its members are being met. When circumstances arise where a manager may not be able to adapt effectively, it is crucial to empower other team members to participate.



## Communicating with Your Team

A crucial element of managing any team is the ability to express the goals of the project in a manner that is understandable to the team, the beneficiary, and any stakeholders. Communication may take a variety of forms, both written and verbal, as well as both analog and electronic.

### Written Communication

Communicating through written directions or documents can allow a team to work on a project or address issues without having to meet up in person. The resolution of any issues can be written down and sent out to the team, allowing everyone to be informed about a situation.

However, there are drawbacks to using this form of communication; it can be difficult to interpret nonverbal cues within written text (such as humor, sarcasm, complex actions, and tone).

### Verbal Communication

Conversing directly with someone can be significantly more efficient than using electronic means because of the improved ability to convey tone and other quirks of communication more effectively.

Issues with this form of communication arise when team members cannot communicate because they are too far apart to meet to discuss the project. Luckily, this issue can be resolved by using remote conferencing technology, such as a conference call.

### Electronic Communication

As technology continues to progress, electronic means of communication become more relevant to managing projects and teams. Many electronic tools for communicating now combine elements of both verbal and written communication, with increased efficiency and results. Possible tools may be email, video conferencing technologies (e.g. Skype or Google Hangout), social media channels, or work management apps.

There are some detractions with using electronic communications with your team. Managers cannot ensure that non-team members aren't receiving information, posted information may not be accessible to all members of the team, and project updates may not be permanent depending on the tool used.



## A Diverse Team

In the course of planning and implementing a project, there will likely be times when the project manager must interact with key stakeholders, beneficiaries, or team members that may not communicate the same way as them. In these circumstances, it is crucial for the project manager to adapt their method of

communication to their audience, ensuring that their information remains clear, relevant, and accessible to all.

For example, if a project manager is attempting to talk with beneficiaries that are significantly older than the manager, electronic communication may not be the most efficient or appropriate method. Inversely, it may be more appropriate to communicate with young stakeholders through electronic means, as they may not be as familiar with other forms of contact.

This process of adapting your communication style should be continuous. The project manager should always be looking for the most effective way to communicate with their team, and others, to ensure that the goals of the project can be completed.



## Team Activity

Facilitate the game “Telephone” with participants to illustrate challenges with certain forms of communication.

1. Have participants line up, or otherwise spread out, down a hallway or along a wall.
2. Starting at one end of the line, provide a message by whispering it to a participant.
  - “Sally swims at the seashore”
  - “Albert always argues with passing people”
  - “The apple pie is cooling outside on the step”
  - “The crew is down by the river in the valley”
  - As the facilitator of this activity, feel free to create your own messages for the group.
3. Remembering the original message, watch the participants pass the message along the line.
4. Once the message has reached the opposite end, have that participant share the final form of the message with the group.
5. Compare the final message to the original message, and have the participants discuss how this activity relates the above content on communication.



## Review

Evaluate participant understanding of the following points:

- Should donations be handled differently than other materials?
- What leadership model can assist in supervising a team?
- How can a team be motivated?
- When is electronic communication inappropriate for a project?



# IMPLEMENTATION

**Time: 30 minutes**

## Learning Objectives

As a result of this module, participants will:

- Practice setting timelines for a project.
- Explain functions of a project manager during the implementation stage of a project.



## Following Established Timelines

The culmination of the project management process, the implementation stage of a project, brings new challenges for the manager. These challenges will not be overwhelming if the project manager has properly planned and has worked to develop their team in the time leading up to the project implementation.

In the planning stages of a project, timelines should be determined to ensure that a project can be delivered in a timely manner according to the wishes of the beneficiary. Once the implementation stage has been reached, the project manager should ensure that the project continues to adhere to any pre-planned timelines. If adjustments must be made to any timelines or deadlines, the manager is responsible for notifying the team and the beneficiary in an appropriate manner. The implementation process may, itself, have a designated timeline that will be created by the project manager.

When it becomes necessary to adapt or alter a project timeline, the project manager should use this process.

1. **Identify** what has changed from the original timeline up to the moment.
2. **Prioritize** obstacles to the project to ensure that a timeline isn't changed unnecessarily.
3. **Consider Alternatives** that were written down in the Planning Process.
4. **Get Feedback** on the changes to the timeline from the project's team.
5. **Change the Timeline** by writing out the new timeline and sharing it with the team.

As timelines are being set, and especially as they are being monitored for accuracy, a project manager should consider several factors to ensure that the timelines are realistic and relevant. The easiest way to ensure that the timelines will meet this standard will be by using a format that answers these specific questions.

- What is the specific activity or task that must be accomplished?
- Who will be accomplishing this task? Will they need support?

- When will this need to be accomplished, relative to the rest of the project?
- What can be done if the individual is unavailable, or the timing is incorrect?
- How will the team be informed of these plans?



## Team Activity

The purpose of this exercise is to simulate how planning ahead can make your project more productive. Understanding a timeline will help Venturers understand deadlines and develop steps to make their projects more productive and effective.

As the facilitator, assign a new member to serve as the group leader. Pass out sticky notes so that each individual team member has several. Explain to the that this activity will involve them outlining each step of their project and determining the timeline to be able to accomplish it.

Have the leader for this activity, on their own, write each step of their project on their sticky notes (one task per note). All of the other team members should individually do the same. Once each member has finished their list, ask them to share how many steps they had thought of. Discuss as a large group how allowing everyone to contribute ideas might develop a more in depth or broad timeline for their project completion.

Now that each member has developed their own timelines, have the team leader collect all the sticky notes from their group members, and stick them on the wall or a flat surface. Have the team discuss each note, and collaboratively decide which order they should go in.

### Debrief:

- How can others impact your specific project timeline?
- What happened during the planning process?
- When planning a project what is easier, working alone or asking the group to contribute?
- Is it important to outline your project and go step by step until completion?
- As the project leader after this exercise, what would you START doing, STOP doing, and CONTINUE to do?



## Executing a Project Plan

Perhaps the most gratifying part of any project is being able to carry out the vision that the project manager has fostered throughout the planning process. At the time of the project's implementation, keep in mind:

- The project manager should arrive early (before any of the team members) to ensure that the project resources are present or en route, as well as to determine the conditions of the work space.



- Following the arrival of the team, the manager should reiterate the goal(s) of the project to the team, and seek to motivate them if necessary.
- During the implementation process, the manager should be accessible by the team, and should participate in the process to encourage the team.

While the primary function of the manager is not to implement the project personally (but rather to lead the team in accomplishing the goals of the project in a timely manner), the manager can still assist the team in implementing it.

This leadership role may be new for some project managers, especially if this is their first project. This challenge should not be intimidating, however, because this role can be quite simple. Think back to the group activity on what makes a good manager; the implementation stage of a project is when those characteristics of good manager become especially important.

The project manager should strive to provide clear instructions, feedback, and guidance to the team during the project's implementation. Any feedback should be grounded in the goals and vision of the project, and should never be personal criticisms of a team member or their work.

Other functions during this time may include:

- **Supervising project timelines:** The manager should keep the project advancing according to schedule, and modifying any timelines that may not agree with the circumstances of the implementation.
- **Motivating the team:** The manager should seek to prevent the team from becoming discouraged during the implementation of the project.
- **Assisting with the implementation:** If the manager is available, they should assist with the implementation of the project.
- **Delegating tasks to the team:** The project manager doesn't, and shouldn't, need to make all decisions regarding the project's implementation. A good project manager will recognize that knowledgeable members of the team may be able to make more informed decisions, and will empower them to do so.

Although the implementation of a project may seem to be a daunting task, it is important to stress that it is fully achievable by any project manager that has prepared themselves sufficiently. The two crucial takeaways of implementing a project should be that it is vital to trust one's team with implementing the goals of the project, and that being flexible in timelines can translate into the success of the project.



## Review

Evaluate participant understanding of the following points:

- What roles should a project manager take on during the implementation of a project?
- When should a project timeline be set?
- Are project timelines permanent, or can they be changed? How and when should this occur?



# FOLLOW THROUGH

**Time: 30 minutes**

## Learning Objectives

As a result of this module, participants will:

- Explain project sustainability and how it relates to ethics.
- Explain the importance and process of conducting a team reflection.
- Discuss the reporting requirements of projects.



## Post-Project

Following the completion of a project's goals, it is necessary to "tie up loose ends" by engaging in follow-up activities. These serve to foster the possibility of future engagement with the beneficiary, as well as ensuring that the project is truly finished according to the original scope statement.

It is the responsibility of the project manager to personally follow through on the project, taking the time to express appreciation to the team and concluding any final business of presenting the project to the beneficiary.



## Sustainability

A project manager should always be conscious of any unintended impacts of their projects, especially if there is potential for environmental disruption. Minimizing the disruption of the environment, whether through careful sourcing of materials to minimize impact or through altering work methods to avoid disturb the project's surrounding environment, should be thought of far in advance of a project's completion.

There is, however, another type of sustainability in reference to projects. The sustainability of a project can also be whether it will be able to last for its planned duration or how it will be maintained into the future. This type of sustainability is directly linked to the planning stages of the project management process, again illustrating how the project manager is a crucial figure in ensuring that the project is carried out, both now and in the future.



## Creating a Sustainability Plan

When a project manager is generating a sustainability plan, they should consider some of these questions.

- What is the expected duration of the project?

- How long after that duration is it acceptable for the project to persist?
- Who is responsible for maintaining the project up to its expected duration?
- How will the project be maintained up to its expected duration?
- Are the resources for maintenance available and accessible through its expected duration?

If the project is temporary, a sustainability plan may not be necessary, however it could still prove to be a useful tool in evaluating the goals of your project. An example of a sustainability plan outline can be found in **Appendix D**.



## Discussion

Facilitate a discussion with participants on the merits of having a sustainability plan. This can be extended into an examination of the ethical responsibilities of serving as a project manager, as well as a discussion of what sustainability looks like to them.

The following topics or ideas are possible results of this discussion:

- Having a sustainability plan means that future stakeholders or beneficiaries can enjoy the project.
- A sustainability plan allows for greater delegation on the part of the project manager.
- A project manager, in bringing their vision to life, may be ethically encouraged to make it last for the greater good of the community.
- Sustainability means maintaining any permanent structures or features of a project.
- Sustainability also means having a success plan in place for replacing stewards of the project.



## Debriefing

With the project complete and implemented, and the team beginning to disband or move on to other projects, the project manager should take the time to reflect on the project with the team and solicit feedback to improve future projects.

Feedback, at any point in planning or implementing a project, is crucial to the continuing success of the team and project manager. Constructive feedback should always be shared between the team and the project manager, as well as between individual members of the project team. There should not simply be a designated period for feedback, but rather the project manager should always be prepared to accept and incorporate feedback from others. By constantly improving the project through feedback, the project manager is able to ensure that the project's outcome is most closely aligned with the realities of the project

and with the goals of the beneficiary and stakeholders. Without feedback, a project may not be as relevant or impactful as it otherwise could be.

The final reflection can be as simple or elaborate as the circumstances require and the project manager feels is necessary. A project with a small team may not require the same amount of effort to provide feedback as a team of several dozen. This reflection will provide a sense of closure to the team, as well as serve as an opportunity to recognize and thank the team that helped accomplish the project.

This reflection can follow the format below, or any other format that is suitable:

- **Gather the team:** The project manager should bring the team together in a neutral location, where there is a positive or upbeat atmosphere.
- **Ask for impressions:** Starting the conversation off with impressions will provide the project manager with information about how the team is feeling, which can inform the direction of any future questions.
- **Ask for feedback:** The project manager should ask for any feedback that the team may have to improve future projects, both those that are similar to the completed project or any others.
- **Ask for positive actions:** The project manager should ask the team for instances where team members were doing good work and deserved recognition. This could also be substituted for the project manager recognizing positive behaviors or individuals.
- **Thank the team:** The project manager should wrap up the reflection by thanking the team for their assistance in implementing the project, as well as thanking them for providing honest feedback to improve future projects.
- **Celebrate the implementation:** The team should celebrate the completion of the project.

With the above steps, the project manager can facilitate a meaningful reflection for the team that will cap off their hard work, while also providing valuable feedback to the beneficiary and stakeholders.



## Reporting Requirements

Earlier in this training, the process of logging hours into the core awards, Journey to Excellence, and Messengers of Peace programs was discussed. These are all opportunities to record information that can help enrich the experience of the team and project manager, as well as provide a reference point for future endeavors.

At the conclusion of the project, however, there can be additional reporting requirements in addition to those to record service hours. These requirements may take many forms, ultimately depending on the beneficiary. There are some beneficiaries that may ask for a final report or presentation on the project, listing information on the project's impact, reach, and operation. There are other beneficiaries that may not require something as formal as a presentation, but will instead ask for the project manager to have a conversation with the beneficiary to discuss the process of completing the project.

This report or conversation can be a great time to share what the project manager learned in the team debriefing, and possibly contribute to a future relationship with that same beneficiary. This would also be the time to complete any paperwork required to submit the project to the beneficiary.



## Discussion

Facilitate the presentation of each group's project, timelines, sustainability plans, and other materials to the class. Each group should receive no more than 3 minutes to present their idea to the class, acting as though the class is the beneficiary receiving a report.

Following each presentation, the class may be allowed to ask questions of the presenting group to understand the reasoning behind their project choices throughout the training.



## Review

Evaluate participant understanding of the following points:

- What is a sustainability plan? What does it look like?
- When should a team debriefing or reflection occur?
- Why are reflections important?
- Why should project managers be prepared to report on their project?



# CONCLUSION

## Learning Objectives

Review course objectives:

- Define common project management terminology.
- Explain what a project is, and how to organize one.
- Apply project management skills in a Scouting situation.
- Interpret team dynamics to further the aims of a project.
- Design budgets and timelines that support the goals of a project.
- Explain the necessary processes to accomplish a project successfully.
- Explain the value of sustainability in the project management process.
- Explain the value in collecting feedback to improve future projects.



## Course Closure

The word “project” can have different meanings to different people, however there is one common thread that connects all definitions and understanding: passion and a desire to accomplish one’s goals.

The Venturing program is uniquely suited to align the passions of our members to the needs of communities throughout the country. Those members that desire to make an impact on the world are able to do so through the project management process. With a distinct sequence, and an emphasis on creating meaningful experiences for project managers and beneficiaries alike, the project management process encourages Venturers to grow as individuals by providing service to others.

Throughout this session, participants have been exposed to planning techniques, budgeting tips, lessons in how to write scope statements, and much more. These skills are almost universally applicable, bringing Venturers closer to their communities by empowering youth to carry out projects closer to their homes and communities. Participants should leave this session excited to carry out their projects, having seen how easy the process can be when simple steps are taken to prepare a project for success.

To judge the maturation of participants’ skills in project management, simply look at the products of this session; the hard work, the excitement, and the questions that may still be unanswered. So much of Venturing, and project management, hinges on the exploration of individuals who are ready to change the world. With this session, you are now prepared to do just that.



## Closing Discussion

Have each team of participants share the most impactful lesson they took from the training, allowing approximately 3-5 minutes for each team to discuss and decide upon their lesson. Following this time, have each team present their topic to the large group, and take note of topics that were not discussed by any team.

Lead a discussion of topics, found on the list of below, that were not mentioned by any of the teams.

- The value of serving others.
- The necessity of planning a project well.
- How to write out a project plan and scope statement.
- How to form a budget.
- The process for leading a project.
- The need for contingency plans.
- How to adapt plans to a changing situation.
- How people can be motivated.
- The importance of communicating with members of the project team.
- The importance of feedback.
- How to facilitate a debriefing.

# Appendix A: Example Scope Statement 1

## PROJECT SCOPE STATEMENT VENTURING CREW 123

**PROJECT NAME:** Chicago Urban Excursion

**PROJECT PURPOSE:** A summer “Tier III” adventure for the crew

**PROJECT LEAD:** Jane Doe (Crew VP Program)

**PROJECT SUPERVISOR:** Mr. Smith (Crew Associate Advisor of Program)

**START DATE:** January 1, 2018

**END DATE:** August 1, 2018

**DESCRIPTION:** To plan and fundraise for a weeklong trip to Chicago, IL, that allows crew members to 1.) discover its unique culture, 2.) explore the art and history of the city, and 3.) learn how to navigate using a complex public transportation system (buses and trains).

**DESIRED RESULTS:** Provide the crew with a memorable, safe summer adventure. Fundraise enough money to finance a minimum of a quarter of the price.

**ACCEPTANCE CRITERIA:** Meets desired expectations/requirements of Crew Officers

**CONSTRAINTS:** Must have a set budget by April 1 to allow participants to make a down-payment; all fundraisers must take place before crew members leave for summer camp/vacation in June. The trip itself must be no longer than 6 days, and take place at the end of July. It must be able to accommodate between 10-15 Venturers/Advisors combined.

**APPROVAL:** **Sign and Date When Approved:**

Crew President: \_\_\_\_\_

Advisor: \_\_\_\_\_

Crew Committee Chair: \_\_\_\_\_



# Appendix A: Example Scope Statement 2

## PROJECT SCOPE STATEMENT VENTURING CREW 123

**PROJECT NAME:** Little Free Library

**PROJECT PURPOSE:** Crew service project

**PROJECT LEAD:** Robert O’Brien (Crew Member)

**PROJECT SUPERVISOR:** Mrs. Gomez (Crew Advisor)

**START DATE:** June 15, 2018

**END DATE:** September 1, 2018

**DESCRIPTION:** To identify a location, get all necessary permits, and built an outdoor public book exchange (a large, birdhouse-style receptacle along a public sidewalk). Work with the Springfield City Book Club to identify project donors, and name a caretaker to provide any necessary future maintenance.

**DESIRED RESULTS:** Provide the community with 24/7 access to free books; this will encourage them to read more often, and will give them a place to donate used books.

**ACCEPTANCE CRITERIA:** Meet all size and appearance guidelines set out by the city zoning committee and the local area’s neighborhood association.

**CONSTRAINTS:** The Little Library must be built to be weatherproof, and installed before the ground freezes late in the fall. The location needs to be along a busy pedestrian pathway, and easy to access by the future caretaker. It must be officially registered online as a legitimate book exchange.

**APPROVAL:** **Sign and Date When Approved:**  
Crew President: \_\_\_\_\_  
Advisor: \_\_\_\_\_

Appendix B: Framework Activity Page 1



Appendix B: Framework Activity Page 2



# Appendix C: Example Budget 1

Chicago Urban Excursion Budget (Bottom Up Approach)				
	PROJECT TASKS	Number of People	COST Per person	TOTAL PER TASK
Travel Expenses	Round Trip Airfare (Baltimore Washington to Chicago Midway)	15.0	\$480.00	\$7,200.00
	Travel from Airport to Accommodations	15.0	\$30.00	\$450.00
	Travel from Accommodations to Airport	15.0	\$30.00	\$450.00
	Bus & Subway Fare (7 Day Pass)	15.0	\$28.00	\$420.00
	<b>Subtotal</b>	<b>15.0</b>	<b>\$568.00</b>	<b>\$8,520.00</b>
Room & Board	Hotel (per person) (2 per room)	15.0	\$560.00	\$8,400.00
	Breakfast (Estimate)	15.0	\$12.00	\$180.00
	Lunch (Estimate)	15.0	\$18.00	\$270.00
	Dinner (Estimate)	15.0	\$36.00	\$540.00
	Other Food (Estimate)	15.0	\$10.00	\$150.00
	<b>Subtotal</b>	<b>15.0</b>	<b>\$636.00</b>	<b>\$9,540.00</b>
Entertainment & Experience	Art Institute of Chicago Tickets	15.0	\$35.00	\$525.00
	Adler Planetarium	15.0	\$34.95	\$524.25
	Theater Tickets	15.0	\$105.00	\$1,575.00
	Shedd Aquarium Tickets	15.0	\$28.95	\$434.25
	Chicago Cub Tickets	15.0	\$65.00	\$975.00
	Brookfield Zoo	15.0	\$18.95	\$284.25
	<b>Subtotal</b>	<b>15.0</b>	<b>\$287.85</b>	<b>\$4,317.75</b>
<b>Total</b>	<b>Total cost</b>	<b>15.0</b>	<b>\$1,491.85</b>	<b>\$22,377.75</b>

## Appendix C: Example Budget 2

Little Free Library (Top Down Approach)						
				<b>BUDGET</b>	<b>ACTUAL</b>	<b>Under(Over)</b>
			<b>Total</b>	<b>\$ 2,500.00</b>	<b>\$ -</b>	<b>\$ 2,500.00</b>
Task	Materials		Fixed	Budget	Actual	Under(Over)
	Units	\$/Unit	Costs			
<b>Permits</b>				<b>\$ 500.00</b>	<b>\$ -</b>	<b>\$ 500.00</b>
Building Permit			\$250.00	250.00		250.00
Sidewalk Closure Permit			\$250.00	250.00		250.00
<b>Building Materials</b>				<b>\$ 1,500.00</b>	<b>\$ -</b>	<b>\$ 1,500.00</b>
Lumber	60.0	\$5.00		300.00		300.00
Concrete & Tools	5.0	\$30.00		150.00		150.00
Paint/Stain	2.0	\$50.00		100.00		100.00
Paint Brushes	10.0	\$10.00		100.00		100.00
Prep Materials				-		-
Tape	10.0	\$5.00		50.00		50.00
Tarps	2.0	\$25.00		50.00		50.00
Power Tool Rental			\$500.00	500.00		500.00
Truck/Trailer Rental			\$250.00	250.00		250.00
<b>Kick-Off Event</b>				<b>\$ 500.00</b>	<b>\$ -</b>	<b>\$ 500.00</b>
Books			\$100.00	100.00		100.00
Advirtizing			\$100.00	100.00		100.00
Decorations			\$50.00	50.00		50.00
Food			\$150.00	150.00		150.00
Drink			\$100.00	100.00		100.00

# Appendix D: Example Sustainability Plan

**[NAME OF PROJECT] Sustainability Plan**

**Project Vision:** Describe what success looks like in the long term for your project

**Project Background:** Briefly summarize the history of the project and its current state

**Current Funding Sources:** List any and all financial resources available to your project and their expiration

**Partners:** List any people or groups that have provided resources – financial, in kind, organizational, etc. – to your project

**Project Elements to be Sustained:** Describe the elements of your project to be sustained. This can include physical resources or facilities, partnerships, processes, etc.

**Project Time Frame:** Briefly discuss the timeframe of your project

**Sustainability Time Frame:** Briefly discuss the timeframe for implementation of your sustainability plan

<b>Sustainability Objective:</b> Identify the type of sustainability you are trying to achieve with this objective. Is it environmental, organizational, resource, etc.? Then, write a SMART objective for attaining sustainability in that domain.				
<b>Objective Goals:</b> Enumerate the sub-steps needed to achieve this objective	<b>Who's responsible?</b> Assign a specific person to this step and identify how they will be kept accountable	<b>What does success look like?</b> What metrics will you use to track the completion of each step and how will you know when the step is completed?	<b>What resources are needed and where will they come from?</b> What resources – financial and non-financial – are needed, and identify specific people or places from which they can be obtained.	<b>When?</b> What's the due date for this step?
1.				
2.				

