A PROJECT MANAGEMENT FRAMEWORK FOR
SERVICE-LEARNING COMBINED WITH STUDENT CASE WRITING

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Abstract

This paper outlines a project management framework that a faculty member and student can use to help plan and coordinate a service-learning project being undertaken as independent study. Goals include production of useful results for the client and a written case-study of publishable quality. In addition to helping to ensure timely completion of the project, the framework includes components that encourage a meaningful service-learning experience for the student. After relevant literature is reviewed, components of the project management framework are described. The paper concludes by discussing a number of issues associated with using the framework.

KEY WORDS: Project management, service-learning, student case writing

INTRODUCTION

Some service-learning opportunities may best be thought of and managed as projects. A project is a set of interconnected activities that results in a unique product, and it has definite starting and ending points. Examples of service-learning projects include the development of a website for a nonprofit organization and the production of a business plan for a small business or community agency. Rather than being included as part of a semester-long course, these opportunities might lend themselves to independent study projects undertaken by a student or group of students under the supervision of a faculty member. In such instances, the goals of the independent study could include:

- production of a useful product or service for the client;
- a meaningful service-learning experience for the student(s);
- development of a written case-study of publishable quality.

The purpose of this paper is to present a general project management framework that faculty members and students could use to help ensure that these goals are achieved within the desired timeframe. After a review of relevant literature, the paper presents components of the framework, and it concludes with a discussion of issues associated with using the project management framework.

The framework’s development reflects the author’s experiences working with students on independent study projects, co-authoring cases with students, and teaching a service-learning course. Experience has shown that high levels of maturity and responsibility will be required of any student undertaking an independent study project that combines the goals described above. These qualities are most likely to be found in motivated graduate students, although exceptional undergraduates might also meet the requirements. When opportunities arise to work on projects with motivated and talented students, the framework presented here could help a faculty member to structure the independent study without having to start from scratch. Although the framework is developed for projects that include both service-learning and case-writing, if either of these is not included in the independent study, many of the framework’s components could still be used.
LITERATURE REVIEW

This paper cites numerous references as it outlines relevant elements of service-learning and case writing. Project management references are then cited, emphasizing those most closely related to service-learning and student case writing.

SERVICE-LEARNING

Hefferman [2001] enumerates these four basic principles related to service-learning:

1) engagement, where students engage with the community;
2) reflection, where students make connections between theory and practice, and they reflect upon the importance of the service;
3) reciprocity, where participants relate as colleagues, not just as consultants and clients; and
4) public dissemination, where the work is presented to a broad audience.

Student case writing is obviously related to principle #4. Hefferman also describes six models of service-learning, of which the following two could potentially benefit from the application of project management methods:

• “Problem-based service-learning,” and
• “Undergraduate community-based action research.”

For the latter, she mentions the following challenge:

“This model assumes students are competent in time management, are self-directed learners, and can negotiate diverse communities. These assumptions can become problematic and the ramifications of students’ failures can impact the community.”

In this context, project management methods may be especially useful for helping students with time management.

With respect to reflection, much as been written on the use of journals for that purpose [e.g., Cooper, 1998]. The Campus Compact website [www.compact.org], which is a well-established service-learning resource, describes the following reflective activity:

“Assign case-studies to help students think about what to expect from the service project and to plan for the service activity. Use published case-studies or instructor developed case-studies based on past service-learning projects.”

This is relevant in that it suggests a valuable use for the outputs of projects focused on service-learning and student case-writing.

Under reflective activities, the Campus Compact website also describes the following two types of journals:

1) “Structured journals. Use structured journals to direct student attention to important issues/questions and to connect the service experience to class work. A structured journal provides prompts to guide the reflective process. Some parts of the journal may focus on affective dimensions while others relate to problems-solving activities.”

2) “Critical incidents journal. Ask students to record a critical incident for each week of the service project. This critical incident refers to events in which a decision was made, a conflict occurred, a problem resolved. The critical incidents journal provides a systematic way for students to communicate problems and challenges involved in working with the community and with their teams and can thus help in dealing with the affective dimensions of the service experience.”

Considering that a written case study might cover many of the same elements described above, the production of these types of journals could have a strong relationship to the writing of a case study. Also related is the following, which the Campus Compact website includes under reflective activities:

“Ask students to write an integrative paper on the service project. Journals and other products can serve as building blocks for developing the final paper.”
CASE WRITING

In their comprehensive book on case writing, Naumes and Naumes [2006] outline the steps involved in developing a case, including identification of objectives and gathering of data. This book would be an excellent reference for both the student and faculty member involved in an independent study project that includes case writing. Naumes and Naumes distinguish between different types of cases – i.e., research versus teaching and evaluative versus decision-focus. When a case results from a student’s service-learning experience, it is most likely to be of the teaching and evaluative types – i.e., it would provide a description of a service-learning project so that others may learn from it. One of the challenges for students writing cases based on service learning experiences is remaining objective while telling the story. Naumes and Naumes include discussion of students as case writers and how this relates to action research.

In describing characteristics of action research, Rowley [2003] lists the following two goals: 1) solving a problem; and 2) making a contribution to knowledge. She also discusses journal keeping and reflection as important parts of action research. In discussing the writing of a work-based research project report, Rowley describes the following process:

“Probably starting with a chronological account of events, the task is to integrate perspectives from different sources, and at the same time to reference those sources. This may include quotes from interviews, small extracts from documents, details of structures of training sessions, meeting agendas, and analysis of the language used by participants. Again, because all action research projects are different, there is no recipe. The researcher is seeking to generate as objective a story as possible, and to demonstrate the authority on which the story is based.”

This process has many similarities to case-writing aspects discussed by Naumes and Naumes [2006], including the use of multiple sources, objectivity, and the perspective of telling a story. A key difference between teaching cases and action research reports is that the former are written for use in courses. Stringer [2007] provides a comprehensive look at community-based action research. He includes chapters on planning the research, data gathering, developing solutions, and organizing written reports. Nath, Sikken and Cohen [2005] describe the experience of education students in action research combined with case writing.

The combination of service-learning and case writing is discussed by Seeger [2006], who describes experiences at Bentley College, which has a long history of business student involvement in service-learning projects. Seeger’s students worked in teams as part of a semester-long course, with each team producing a written case study. Many of the cases concerned non-profit organizations, who often needed help and were willing to allow students access. Seeger states that students were frequently very committed to projects at non-profits, but sometimes there were concerns that objectivity would be lost when students fell in love with their case sites. Many of the cases were of high quality, but none ended up being published as students were not motivated to follow-up after they received their grades at the end of the course.

PROJECT MANAGEMENT METHODS

Kloppenborg and Baucus [2004] describe problem-based learning as part of a project management course, where students work within nonprofit organizations to help solve problems. Although their focus in on projects as part of a traditional semester-long course, many of their suggestions could apply to projects undertaken as independent study. Based on their experiences, characteristics of successful projects include:

- well-defined problems and desired outcomes;
- specific deliverables expected from students; and
- application of project management concepts to the project.

Deliverables related to project planning include:

- a project charter;
- work breakdown structure;
- responsibility chart;
- detailed schedule; and
communication and control plan. Implementation of the plan is typically not included as part of the course, and the final deliverable is a live presentation. The lack of implementation makes their approach different from that of the current research, which includes implementation in the framework.

Within the context of a semester-long course, Kryder [2006] describes a number of project management documents that students can use for service-learning projects. These include: an engagement letter for the beginning of the project; a work plan or work breakdown structure and a Gantt Chart for project planning; e-mail status reports for the instructor; a transmittal letter at project completion; and a performance evaluation for self-assessment.

These elements, some of which are similar to those described by Kloppenborg and Baucus [2004], may also prove useful for service-learning combined with case writing under independent study.

As another example of project management combined with service-learning, Brown [2000] describes the experience of MBA students who help renovate houses for low-income senior citizens as part of a project management course. She describes how the activities involved in the service-learning experience help reinforce important project management concepts, including planning tasks, coordinating schedules, tracking project progress and communicating with the client.

Hubbard [(2005] provides additional information on how project management tools can facilitate student team projects.

The reported usefulness of project management tools in various student project contexts suggests that a project management framework for service-learning combined with case writing could offer significant practical benefits.

COMPONENTS OF THE FRAMEWORK

Building off of prior research and personal experience with independent studies and service-learning courses, the following components are outlined for the framework:

- Service Learning Agreement
- Project Charter
- Gantt Chart
- Weekly Progress Reports
- Weekly Reflections
- Transmittal Letter at Project Completion

The framework has been kept as simple as possible so as not to overload the student and faculty member with unnecessary paperwork. Much work will need to be done to complete a successful project and produce a useful case study, so there is no need to add components for the sake of increasing the work content of the independent study. Another aspect of the framework’s development is that existing materials are referred to wherever possible. As indicated in the literature review, much has been done in the areas of service learning and project management, and there are many existing resources that faculty members and students can draw upon. As the components of the framework are described below, existing examples are referenced where appropriate.

SERVICE LEARNING AGREEMENT

The first document of the framework is a Service Learning Agreement, which helps ensure that all parties are on board prior to the start of the independent study. With a completed Service Learning Agreement, the supervising faculty member and school administrators can have confidence that the student and community partner are in agreement regarding the nature of the project.

Universities with offices or centers that support service learning may have their own Service Learning Agreement forms. These offices and centers may also have policies and procedures, such as background checks, that they routinely use prior to the start of any service learning partnership. In the absence of a form from their own university, faculty members and students can produce their own, borrowing elements
from those available from other universities. Typical elements of a Service Learning Agreement form include:

- Title of the project
- Brief description of the project and its purpose
- Overall time frame of the project
- Contact information for the primary contact at the community partner
- Signature lines for student, faculty member and community partner.

Examples of Service Learning Agreement forms are available from several universities. The University of Florida’s form, which is available at http://www.dso.ufl.edu/cls/programs/servicelearning/documents/Project-Agreement-Form.doc, includes all of the elements listed above, as well as others geared towards service learning activities that are used as part of a traditional semester-long course. Other examples include forms from Marshall University (http://www.marshall.edu/_servlets/SrvLearn/partnershipagreementform.asp) and Humboldt State University (http://studentaffairs.humboldt.edu/_download/student_agreement.pdf).

While the specific elements included in Service Learning Agreement Forms may vary, the overall goal is to ensure that all parties are in general agreement regarding participation in a service learning project. Beyond what is seen in the examples discussed so far, the faculty member and student may also want to consider adding the following to the form: indication that a written case study will be produced. Although the production of a written case study might not have an impact on the goals of the project, mentioning this up-front could help initiate discussion of the permissions that may be required prior to publication. If confidentiality issues are such that permission would be unlikely, the faculty member and student should be aware of this as early as possible.

Another topic that should be clarified up-front is the grading structure for the independent study. The community partner does not need to be involved in this, but there does need to be some understanding between the faculty member and student. The grading structure and other aspects of the independent study could be included in a syllabus, which the community partner would not need to see.

PROJECT CHART

The Project Charter provides details of the project that go beyond those included in the Service Learning Agreement. In terms of timing, the Project Charter should be completed after the first week of the project, while the Service Learning Agreement should be in place before the project starts.

The Project Management Institute provides a Project Charter Template (http://tscognos.com/jpexco/TemplatesPMBOK.htm), comprising the following elements:

- Synopsis
- Purpose/business need
- Product description and deliverables
- Assumptions, constraints, risks
- Resources
- Approval signature lines

The Project Charter goes beyond the Service Learning Agreement by providing additional details of the project and how it will be approached. Further details on key aspects of project planning are included in the next component of the framework, the Gantt Chart.

GANTT CHART

At the end of the second week of the project, the student should know enough about the work to be performed to produce a Gantt Chart. In its most basic form, the Gantt Chart depicts the tasks or activities that comprise the project and the time frame for their completion. The example shown in Appendix A lists nine tasks that must be completed for a website development project, and then it shows a Gantt Chart that provides a detailed look at the time window planned for the completion of each task. In constructing a Gantt Chart, the student will need to consider which tasks can be done in parallel and which must be completed before others can be started.
To produce a Gantt Chart on the computer, the picture drawing features of word processors can be used to produce a simple version such as that shown in Appendix A. Software packages designed to produce Gantt Charts, such as SmartDraw (http://www.smartdraw.com), are also available. More information on Gantt Charts can be found at http://www.netmba.com/operations/project/gantt/.

WEEKLY PROGRESS REPORTS

From the third week of the project onwards, a progress report should be submitted by the student to the faculty member at the end of each week. An example format for a progress report is shown in Appendix B. Ideally, achievements reported in weekly progress reports should match tasks presented on the Gantt Chart. When this is not the case, resolutions must be found so that the project can remain on track. Failure to submit progress reports and lack of achievement in successive weeks are key indicators that the student is underachieving. It is recommended that a student submit a progress report even if little progress has been made in the preceding week.

The faculty member should offer feedback on the student’s progress soon after receiving a progress report so that the student can consider it as they plan their activities for the coming week. Weekly progress reports are an important mechanism for communication between the student and the faculty member, but there will inevitably be times when face-to-face meetings will also be needed. Such meetings may be prescheduled as part of the independent student, or feedback on a progress report may include something along the lines of “we should get together soon to discuss this.” Frequent communication between the student and faculty member over the course of the independent study will help avoid situations where the student is left with too much to do towards the end of the semester. Experience has shown that quality suffers when a lot of writing is left until the night before a report is due.

WEEKLY REFLECTIONS

As mentioned earlier, reflection is an important part of service-learning. By reading a student’s weekly reflections along with their weekly progress reports, the faculty member can gain a more thorough understanding of the student’s experience.

Written reflections can take the form of structured journals or critical incidents journals, as described by Campus Compact (http://www.compact.org/disciplines/reflection/types.html). Many other forms of written reflection are also available, including the “What? So What? Now What?” format described by the Northern Service Academy (http://www.studentsinserviceoamerica.org/tools_resources/docs/nwtoolkit.pdf). With this format, the first question encourages objective reporting of the student’s experience, while the second prompts analysis and discussion of feelings. The “Now What?” question looks towards the future, encouraging the student to think about how the experience may change their thoughts or actions.

The weekly reflections contribute towards the independent study’s goal of a meaningful service learning experience for the student. Objective portions of the weekly reflections may also contribute towards the development of the written case study.

As part of the syllabus for the independent study, a faculty member will need to specify grading criteria. The syllabus should clearly state the need for submission of acceptable progress reports and reflections each week, but it might not specify grading scales for each of these components. In practice, it is probably not a good idea to assign letter or numerical grades to weekly reflections. In the faculty member’s feedback to the student each week, direction can be provided if more is required in terms of content or depth. While the reflections are intended primarily for the student’s benefit, the faculty member may find that reading student reflections makes project supervision more interesting and rewarding.

TRANSMITTAL LETTER AT PROJECT COMPLETION

The final component of the framework documents project completion in a professional way. More than a mere courtesy extended by the student to the community partner, the transmittal letter serves to summarize accomplishments, express gratitude and provide closure. A transmittal letter outline used by a technical writing class at the University of Idaho can be found at: http://www.class.uidaho.edu/adv_tech_wrt/week14/letter_transmittal_outline.htm. This outline structures the letter as follows:
CONCLUSION

The related areas of service-learning, action research and case writing each has its own body of literature. Many elements that are common amongst these areas, such as journaling, reflection, objectivity, problem-solving and story-telling, are relevant to community-based student projects undertaken as independent study. From the literature in these areas, applicable elements have been integrated and structured within a project management framework that faculty members and students can use to help ensure useful outcomes and timely completion of projects. In developing the project management framework, the structure was kept general so that it could be applied to a wide variety of projects. For many service-learning projects, this framework could:

- help ensure a beneficial outcome for the client;
- help the student get the most out of the service-learning experience;
- help the faculty member organize and manage the project without having to develop their own framework from scratch; and
- help produce a well-organized written case study.

A number of issues associated with service-learning projects and case writing are not directly addressed by the framework. One is the level of involvement of the faculty member in performing the project and writing the case study, along with the related question of co-authorship. Since publications are expected of university faculty members, the possibility of co-authorship may be a factor that motivates a faculty member to take on the extra work of supervising an independent study. The faculty member’s expertise may result in a higher-quality written case study, and their experience with journal submission processes could very well make publication more likely. Coordination between the student and faculty member as they work jointly on the project and written case is an issue that would need to be addressed either outside the project management framework or within the Gantt Chart and Weekly Progress Report components.

Another issue to consider is the extent to which the student should include themselves within the written case study. The goal of objectivity suggests that they should leave themselves out of it whenever possible. However, if they were heavily involved in designing and implementing improvements at the organization, it may not be possible or desirable to exclude themselves from the description. In such situations, referring to themselves in the third person within the case would probably be appropriate.

The question of conflicting goals is raised by the student’s involvement in the project as a service-learning experience and as an objective case writer. The faculty member will need to be aware that the student may have a tendency to be less than objective as they become deeply involved with the non-profit organization. The combination of service-learning and student case writing can present challenges, but the possibility of useful results and meaningful experiences can make such projects worthwhile for all parties involved. The project management framework developed in this paper offers a practical structure that can be used by those planning to undertake such projects.

REFERENCES


Heffernan, K., Fundamentals of Service-Learning Course Construction (Campus Compact, 2001).


www.compact.org/disciplines/reflection
APPENDIX A – EXAMPLE OF A GANTT CHART

Tasks for Website Development Project:
- Task 1: Meet with client and discuss website’s general requirements/features
- Task 2: Create website “Tree” design, receive approval
- Task 3: Find template/background for website, purchase if necessary
- Task 4: Design layout of web pages
- Task 5: Client provides media/links/text files
- Task 6: Build Site
- Task 7: Walk-through Site with Client
- Task 8: Complete Site
- Task 9: Test Site - Ask for user feedback

Gantt Chart:

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APPENDIX B – EXAMPLE OF WEEKLY PROGRESS REPORT

Weekly Progress Report # __

Date: ______________

Team member(s): ________________________________________________________

Client: _________________________________________________________________

Project identification: _____________________________________________________

Achievements this period:

Changes in scope/time/concept:

Anticipated problems; proposed solutions:

Client reactions/concerns:

Activities planned for next period:

Accomplishments expected during next period:

General comments/observations: