Loyola Marymount University
Research and Sponsored Projects

Project Timeline Guide

Project Timelines are key to successful implementation and managing a project. This guide is designed to help you develop and incorporate certain items and tasks in your timelines.

1. Initiation Phase	The Award documents will be routed and approved in Cayuse and sent to PAAA. PAAA will coordinate an award meeting with PI to set up the award in Workday. During this phase, the award document will be reviewed to understand the budget, sponsor guidelines, deliverable schedule, reporting requirements, and any specific terms and conditions that will be initiated in this phase.
2. Define Project Scope and Objectives	PIs will establish the project goals and clarify the project's main objectives, key deliverables, and expected outcomes with their research team. These will align with the grant’s proposal. Break the project into smaller, manageable tasks and deliverables. Each task should be clear, specific, and linked to the grant’s goals.
3. Develop a Timeline and Milestones	Work with the Sponsored Project Manager to create a high-level timeline that includes start and end dates for each phase of the project. Ensure the timeline accounts for: - Sponsor deadlines (progress reports, financial reports, final reports) - Internal deadlines (draft reports, preliminary reviews) - Buffer time for unexpected delays or issues Determine Key Milestones: Identify major milestones based on the project's scope, such as: - Project launch - Data collection periods - Completion of specific research phases - Progress report deadlines - Budget reviews - Final deliverables and report submissions
4. Resource Allocation and Task Assignment	Allocate tasks to team members based on their expertise and availability, if applicable. Clearly define responsibilities and expected outputs for each person on the team. This ensures the PI and research team

	roles are well understood. Create a communication plan to decide how often and in what format progress updates will be communicated (e.g., weekly meetings, monthly, quarterly). This helps keep everyone accountable and informed. Determine what resources (internal/depts) are needed for each task (staff, equipment, travel, supplies, etc.
5. Budget Management	Go through the budget line items in detail. Make sure the timing of expenditures aligns with the project schedule (e.g., equipment purchase, staff hiring). For financial tracking, set regular check-ins with PAAA, ensuring that spending stays in line with the grant's requirements. Quarterly budget meetings can be arranged to review budget to actual expenditures.
6. Risk Assessment and Contingency Planning	Consider potential risks that could impact the timeline (e.g., delays in hiring, equipment shortages, compliance issues). Plan for contingencies such as building buffer time into your schedule for high-risk tasks and identify backup resources or alternatives if specific aspects of the project do not go as planned.
7. Internal Review and Approval of timeline?	Before finalizing a schedule, review it with the research team and relevant stakeholders/collaborators to ensure alignment with project goals and compliance.
8. Project Implementation and Monitoring	Hold regular project meetings to review progress, adjust timelines, and address any challenges. Keep a record of these meetings for transparency and compliance. Tracking progress using a management tool against a schedule to allow for close monitoring. Update the project timeline regularly to reflect actual progress versus planned. If there are significant changes (scope, budget, timeline, etc.), communicate these promptly to the sponsor (if required) and adjust the timeline accordingly.
9. Reporting and Close-Out	For progress reports, schedule time for writing and reviewing progress reports before sponsor deadlines for reporting. Ensure you track and document that all deliverables are completed. Allocating time to finalize deliverables, submit reports, and conduct financial close-out activities, ensures compliance and timely reporting.

10. Post-Project Review	After the project is complete, hold a debrief meeting with the research team, PAAA, and ORSP to review what went well and what could be improved. Document lessons learned and capture lessons learned for future projects. Include feedback from the PI and the team.

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