[FRE 547: Project Plan Template] Due May 21, 2025

* The Project Plan should be between 3 -5 pages.
* Complete Sections 1-11 based on the Type of GP you have (Research, Consultancy, or Internship).
  + **Due: May 21, 2025 on Canvas** (Email to Faculty Supervisor and Project Support Team Member, then email to Site Supervisor). Extensions must be approved by Janelle Tan, Graduating Projects Manager, in writing by email.
* Complete Section 12 (Gantt Chart). **Due: June 6, 2025 on Canvas** (Email to Faculty Supervisor and Project Support Team Member).

# Project Title

## Research, Consultancy and Internship

Include a Project Title – keep it simple and direct.

# Project Context

Project Context demonstrates the background and **WHY** this project is required by the organization.

## Research

Describe the need or opportunity that motivated the project and research question. 1-2 short paragraphs.

## Consultancy

Projects usually arise from either a Need or an Opportunity. Provide a brief summary of the current business environment, and either the Need or Opportunity that led to this project. 1-2 short paragraphs.

## Internship

Provide a description of the company, including a brief summary of how your role fits within the organization (which department or team you will be supporting). Describe the overall purpose of your role within the organization.

Describe the role you will take on during the summer and how this role will contribute to the team, department or overall organization.

# Project Objective/s

Project Objectives define **WHAT** you will do in your Graduating Project and the results you are meant to achieve upon completion (identification of the benefits, outcomes or performance improvements after completing the project). These are NOT deliverables!

## Research

Develop the fundamental research question and sub questions – basis the hypothesis format.

Example:

What is the impact of farm property taxes on farmland conservation?

What is the effectiveness of the economic policies at the local, national, or international level in achieving desired outcomes, such as economic growth, employment, inflation control, or income distribution?

What are the labor market dynamics, skill mismatches, and potential policy interventions that influence job creation, skills development, and income equality in the food processing sector?

## Consultancy

1. Develop a main objective that encompasses the big picture of the project, and an outcome statement.

2. Develop sub-objectives that will help achieve your main objective.

Example:

Main Objective: **The objective of this project is to** develop a set of ESG data collection and reporting tools **in order to** support accurate data management and collection for a Sustainability Report.

Sub-Objectives:

- Conduct a needs assessment to understand participants' requirements, preferences, and challenges regarding ESG data collection and reporting.

- Design a customized ESG data collection and reporting tool using Power BI dashboards that is tailored to specific company requirements.

## Internship

Specify the overarching purpose of your project even if it is a series of projects/tasks. You may include specific sub-projects or tasks that you may be involved in.

Example:

**The objective of this internship is to…**[insert].

… review business development options for a new product being developed by the organization.

… develop material to support technology adoption in producer groups.

… assess the financial feasibility of clean energy innovations for industrial use.

# Project Partner Deliverables

Project Deliverables are **objects** such as documents, reports, presentations, or dashboards that you will produce (deliver) during the project to meet objectives. They need to be stated as **nouns** (not actions).

## Research

List your Research Partner Deliverables, and include a short description for each deliverable.

Faculty Supervisor and Student should define the level and detail of the working paper including options of the following:

• Research working paper for a select journal

• Presentation of research findings

• Policy brief

• Stata, R code, Excel and Data analysis report

## Consultancy

List your Project Partner Deliverables, and include a short description for each deliverable.

Examples (include a short description for each deliverable):

• Policy brief report

• Coordinated set of financial statements (NOT “financial assessment”)

• ESG Sustainability report and dashboard (NOT “analysis”)

• Economic impact report (NOT “economic analysis”)

• Cost and margin analysis excel spreadsheet

• Literature review document

• Industry and Competitive Analysis document

• Legacy Document or SOP Manual

## Internship

List your Project Partner Deliverables, and include a short description for each deliverable.

• Some internship-type GP’s emphasize ongoing tasks and operational activities (processes instead of projects), so you may not have specific project partner deliverables. If this is the case, please list down the tasks you will perform during the project. Please discuss this with your Site Supervisor, so you'll know if they expect you to produce specific deliverables throughout the term.

# MFRE Program Deliverables

## Research, Consultancy and Internships

You will also need to submit end-of-term deliverables to the MFRE Program. You can copy paste this into your Project Plan.

These include:

• Project Plan and Gantt Chart – Used to communicate and summarize the scope of work, and the work plan that will guide the summer term.

• MFRE Brief – Short report summarizing the project to be submitted at the end of term in August.

• 2-sentence project summary – A 2-sentence summary that will be added to MFRE’s archives and listing or past Graduating Projects in August. This summary is shared on the MFRE website (public link) and should not contain any confidential information.

• Project Showcase presentation slides – PDF slides that will be presented at MFRE’s Project Showcase event in August.

# Project Approach (and Methods)

The Project Approach provides the **high-level roadmap** for **how** you will complete the project from start to finish. Includes the **identification of major phases** (Phases are based upon the objectives and deliverables) and **milestones**. This section serves as a base to develop a more detailed set of tasks and Gantt chart later on.

## Research

Describe the methods or approach you will be using to answer the research question/s. Include a milestone (or deadline) for each phase.

Example (and provide 1-2 sentence description for each of these phases). Include methods as much as possible:

1. Literature Review (Deadline: June 15)

2. Econometrics fixed effect panel data model using variables of property tax in each municipality, area under grassland conservation, added variables over time (Deadline: July 10)

3. Report writing (Deadline: August 8)

Ensure you have conducted a thorough literature review and present the range of methods others have used to assess similar research questions, why you are using the same or different methods and/or why the selected method is a good fit with your project.

You may visualize this section as a table, flow chart, or written outline, as long as it contains all the elements (**phase, description, and milestone finish date**).

## Consultancy

Define a set of **phases**. Include a 1-2 sentence **description** for each phase. Include a **milestone** (or deadline) for each phase.

Example (and provide 1-2 sentence description for each of these phases). Include methods as much as possible:

1. Research challenges with the marketing of the company's new product (Deadline: May 31)

2. Research industry trends and structure using UBC databases (Deadline: May 31)

2. Collect and organize competitor data (Deadline: June 20)

3. Develop Outline, Major Headings, and Data Visualizations for Market Report (Deadline: July 20)

4. Writing of final report (Deadline: August 8)

5. Obtain final review feedback from SS and FS for final report (August 18)

Include specific methods if applicable. Example: Dupont Analysis, Porter Five Forces, PAM, SWOT, Survey, Focus Groups, ARIMA, Exponential Smoothing, Regression, or LEAN.

You may visualize this section as a table, flow chart, or written outline, as long as it contains all the elements (**phase, description, and milestone finish date**).

## Internship

Describe the high-level approach you will use to complete the project from start to finish. Include a 1-2 sentence description for each approach. If applicable, include a milestone (or deadline) for each phase.

Example (and provide 1-2 sentence description for each of these phases). Include methods as much as possible:

1. Data analysis through Excel, data visualization through Tableau or Python

2. Model development and summary statistics

3. Financial analysis based on company’s standard procedures

You may visualize this section as a table, flow chart, or written outline, as long as it contains all the elements (**phase, description, and milestone finish date**).

# Project Data

Project Data lists data that will be used for the project, including data sources and how they will be accessed. Use the project approach (and methods) as a guide to define data required.

## Research

Define your **data, data sources, how you will access them**. Provide what data is reported, included, and excluded, collection process plus a detailed summary of the data variables. Be as specific as possible.

Example:

• Data - BC rural municipalities data: property tax data and area under grassland conservation over 2000 to 2021.

• Data source: BC provincial database

• Access to data – Faculty Supervisors will provide data using their access to BC provincial data base.

**Important**: Use the first 2 weeks of May to access and evaluate various data sources for the project.

## Consultancy and Internship

Define your **data, data sources, how you will access them**. If you are collecting primary data, identify and describe them as well. If you are conducting Market Research, identify specific reports that you will use for the project.

Example:

• Data – Sales Data (Monthly sales data, $$ and Qty, by store, by month, by product for the last 3 years).

• Data source – Company’s internal sales data in Excel format

• Access to data – the Site Supervisor will provide the raw data.

**Important**: Use the first 2 weeks of May to access and evaluate various data sources for the project.

# Project Risks

Identify project risks (events that can have a negative impact on the project) and proactive mitigation strategies.

## Research, Consultancy, Internship

Identify potential risks (2-5) and potential strategies to mitigate each of them. Risks can result from people, schedule, tasks, data, communication, etc.

Example:

• Risk: The model missed important variables to be able to achieve a meaningful result or results not significant.

• Mitigation: Discuss the model, variables and data carefully and in detail with Faculty Supervisor before starting work on the model.

• Risk: Data unavailable or delayed.

• Mitigation: Conduct a thorough review of data required and available data in early stages of project and align with SS and FS.

• Risk: Accidentally discuss confidential information to external stakeholders.

• Mitigation: Have a conversation with Site Supervisor before the project starts to make sure there is alignment on confidentiality. Sign NDA form.

**Note**: Students should know that all GP information shared with them is confidential and should not be shared with anyone outside their Faculty Supervisor and the MFRE Program.

# Professional Development

Identify your personal and professional objectives for the Graduating Project.

## Research, Consultancy, Internship

Define **at least 1 Personal Learning Objective** that you want to gain from the project.

Examples:

• Deepen understanding of the specific industry, Develop specific technical skills through the project, Networking with professionals in the field, Obtain work experience, etc.

Identify **at least 2 Professional Competencies** that you want to focus on (and work on) during the project, including how you might practice them throughout your project.

Examples:

• Email writing skills, Meeting facilitation skills, Critical thinking skills, Asking thoughtful questions, Building professional relationships, Taking ownership of a project from start to end, Working in a team, Instilling trust with stakeholders, Planning and organization, Being action-oriented, Practicing self awareness, etc.

# Use of Generative Artificial Intelligence (AI)

Any academic work you submit as a student should be your own, including deliverables, literature reviews, reports, and presentations. Submitting materials provided by the MFRE Program or Project Partners into GenAI tools without their permission may constitute copyright infringement and break confidentiality requirements for the Graduating Project. Please make sure you understand the copyright status of material you upload.

## Research, Consultancy, Internship

Discuss the permissibility and limitations regarding use of Generative AI with your Site Supervisor and Faculty Supervisor. Clarify if use of AI is acceptable or unacceptable, and under what specific parameters.

Example:

Acceptable use of AI:

* Generic research for idea generation, but not specifying any details about the company or details of the Graduating Project.
* Input of generic text or emails into GenAI tools to improve grammar, structure or plain language.
* Input of generic questions to learn or troubleshoot specific software functions, (ex: learning Excel formulas, PowerBI shortcuts, troubleshooting R codes)

Unacceptable use of AI:

* Input of company name into GenAI tools.
* Input of any data provided by the Project Partner into GenAI tools.
* Using or paraphrasing AI-generated outputs for any of my deliverables.
* Using GenAI tools to come up with my bibliography.
* Input of text or emails that contain specific Graduating Project information into GenAI tools.
* Copy and Paste of summaries and responses from GenAI to include in reports.

Parameters for use of AI:

* I will disclose any use of AI tools in my deliverables to my Site Supervisor, Faculty Supervisor and MFRE Program, including how I synthesized, analyzed and evaluated the AI-generated results.
* I am required to save any generated text in a separate document, as it may be requested for review during grading.

# Confidentiality and Non-Disclosure

All Graduating Projects are confidential. Students will receive internal company information when conducting their Graduating Project, and this information must be kept confidential and NOT shared with anyone outside their Faculty Supervisor and the MFRE Program.

## Consultancy, Internship

Replace the **$AgencyName** field with the name of your Project Partner Organization. Copy paste the Confidentiality Agreement below and sign the fields at the bottom.

CONFIDENTIALITY AGREEMENT

**Non-Disclosure and Non-Use of Confidential Information**

1. I hereby undertake not to use, nor disclose to any unauthorized person, any confidential information relating to or received from **$AgencyName** for any reason unless expressly authorized by **$AgencyName**, or required by law. Information is confidential information if it is non-public information, clearly marked as such or by its very nature is evidently confidential. This includes but is not limited to financial information, proprietary information, customer information, customer lists, methods, plans, documents, drawings, manuals, notebooks, reports, models, inventions, formulas, processes, software, information systems, information held on staff or student personal files, emails associated with the project and research data. I understand that this applies both during the term of my employment/voluntary work and after its termination.
2. I agree to never remove any confidential information of any kind from the premises of **$AgencyName** unless authorized as part of my duties, or with the express permission or direction to do so from **$AgencyName.**
3. I will not use or disclose any personal or research data I acquire during my work for any purpose that is or may be incompatible with the purposes of that work.
4. I understand that I am required to keep all confidential and personal data securely, and undertake to follow all relevant local procedures in doing so.
5. I understand that I may only use the Confidential Information for the purpose of the graduating project and must not use the Confidential Information for any other purpose without the prior written approval of **$AgencyName.**
6. The Work, and any other materials developed as a result of performing the Work hereunder shall be deemed to be made in the course of the services rendered and shall belong exclusively to **$AgencyName**. **$AgencyName** shall hold the right to obtain, hold and renew, in its own name, patents, copyrights, registrations or other appropriate protection deliverables prepared or developed pursuant to this Agreement.
7. I hereby undertake to ensure that all records provided or created for the purposes of this agreement, including any back-up records, are passed back to **$AgencyName** contact or deleted as directed, once I have received confirmation that the work I was employed to do has been satisfactorily completed and all the required information has been provided in accordance with the **$AgencyName**’s wishes.

**I have read and understood the terms and will follow the terms to the best of my abilities.**

Student Name

Address

Signature

Dated this day of \_ ,20 .\_\_\_

# Gantt Chart (due June 6, 2025)

Outline the TASKS required to achieve your deliverables, and their expected duration. Use the phases from the project approach as a base for identifying these tasks. Remember: Tasks are actions and must be stated in verbs.

## Research, Consultancy, Internship

Using the high-level phases from your Project Approach, break down each phase into a set of well-defined tasks and then develop a Gantt Chart that includes the list of project tasks, and the duration of each task.

1. Writing task names:

• Action + description

• Active voice

• Unique (no 2 tasks are exactly the same)

2. Task duration:

• General guideline: 1-3 weeks each (if a task takes less than a week, it is probably too granular. If a task takes more than 3 weeks, you should break it down further).

3. Working in teams:

• Add a column indicating who is doing which task

4. Putting them into a Gantt Chart:

• Use the Gantt Chart .xlsx template provided on the Portal.

• Organize the tasks based on Project Deliverables or Phases

• Plan for risk - remember that you are the Project Manager for your project.

• Consider waiting time for items when you need to rely on others - plan accordingly.

• Consider dependencies between tasks.

• Consider tasks that you can do simultaneously.

Note: For **Internships** that are purely task-based and do NOT have deliverables: List the tasks you are required to perform as part of your internship. If there is a lot of ambiguity, you can list the general projects / initiatives / areas of work that you will be involved in, with a short description each.