

Project Management at MBARI Workshop



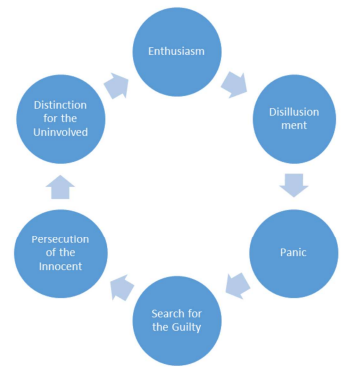
Day One

- PM Responsibilities
- Proposals

Day Two

- Accounting
- Management Tools
- Group Meetings

Six phases of a project



Supporting Materials and Slide Docs

- \\atlas\ProjectLibrary\Project Management Workshop 2019

Project Manager Responsibilities

- Everything
- Everything else
- Annual Report
- Board Bullets
- EC Notes
- Project Updates
- Proposal Writing (Budget Entry)
- ...and managing the project

Project Manager Responsibilities Annual Report



Annual Report

1. Annual Report Instructions, from Chris Scholin's email:

"This is the important part:

- 1) The PMs/PIs whose work we plan to highlight will be contacted directly in the next few days.*
- 2) We ask that all staff members submit information about any publications, mentorships, honors, etc. that relate to your MBARI 2018 work year. These accomplishments will be posted on our website. Please use the attached form to submit this information.*
- 3) In order for us to pull this volume together in a timely fashion, all information must be submitted to Nancy Barr by XXX"**

2. Check instructions each year as they change, due date is usually in January.

2. Annual Report Notes

1. Due annually, must be submitted to Nancy Barr in January
2. Pubs, invited lectures, awards from everyone in the group related to that project
3. No more little paragraph
4. BUT you may be contacted for a longer write up to be highlighted in the Annual Report

- AS an **individual** you are responsible to report mentorships, conferences, pubs, invited lectures, awards, etc

[illegible]

- 7

Project Manager Responsibilities

Project Updates



Project updates

- 45 minute presentation

- Good to do every couple of years

- Why?

 - So people are aware of what you have done

 - Disseminate novel technology/methods/solutions to your colleagues

 - Yes it is a lot of work but often the slides for these will be reused many times over

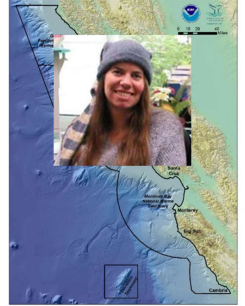
- Other stuff:

 - Web presence of project

 - Communications related to project: within team, within MBARI, outside MBARI

Permits: MB Sanctuary (Federal/NOAA)

- Are you doing an activity that requires a sanctuary permit?
- Some MBNMS (Sanctuary) Permit Triggers
 - Benthic sampling
 - Instrument and mooring deployments
 - Discharges (including chemicals, AUVs, drifters, etc.)
 - Cables
 - Work at Davidson Seamount
- Is it covered under our Annual Permit?
- Annual Permit requires all groups covered to submit:
 - Spreadsheet
 - Project Summary



1. Are you doing work that requires a permit from the sanctuary?
 1. Benthic sampling
 2. Instrument and mooring deployments
 3. Discharges (including chemicals, AUVs, drifters, etc.)
 4. Cables
 5. Work at Davidson Seamount
 6. Sanctuary also wants to know about any work in any SESA, but does not want to discourage research in these areas.
 7. **Ask Mandy if you are not sure.**
2. If so, is your work covered under our general permit?
 1. https://mwww.mbari.org/pco/permits/mbnms-2015-002_feb2015.pdf
 2. Ask Mandy if you are not sure.
3. If it needs a permit but is not covered under our general permit, Mandy needs to know. Most critical case!!!
4. There is an annual report provided to the sanctuary every February, requests from Mandy will be sent out in January. Materials you will need to provide Mandy
 1. Project summary: a narrative of what you did last year and what you plan to do the following year.
 2. Spreadsheet: all the activities you did the prior year under the permit
 3. These are mandatory.
5. Mandy is the single point contact with the sanctuary. If you feel compelled to contact the sanctuary, please discuss with Mandy first.

Permits: Collecting permits – CA

- This is CA department of fish and wildlife
- Are you collecting ANYTHING in an MPA?
- Even if you are just collecting your thoughts in an MPA you probably need a permit.
- Separate but related if you are doing active acoustics talk to Mandy

- 10

Permits: Export Control (ITAR, EAR)

- Reminder that exports of hardware or software/tech data may require a license.
- Exports include giving access or sharing information regarding hardware or software/tech data with foreign nationals by any mechanism (conversation, email, hard copy, etc.) and any location (visitors to MBARI, when traveling in other countries, etc.)



- Request ship days (both how many and when as part of the proposal process)
- First revision of schedule released in late Fall
- This is the best time to change dates so ignore this email at your own peril
- Find your dates using the Ship schedule link



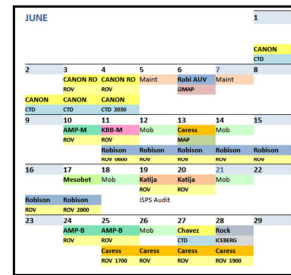
Working with DMO – Ship Schedule

2019 Ship Schedules

Combined RV Western Flyer and RV Rachel Carson 	• RV Western Flyer, RV Rachel Carson • Principal investigators highlighted • Note: Legacy schedules are located on the internal DMO discussion website
RV Western Flyer 	• RV Western Flyer • Principal investigators highlighted
RV Rachel Carson 	• RV Rachel Carson • Principal investigators highlighted
RV Pangea 	• MBARI employees can check RV Pangea availability using the internal online calendar under "Ship Calendars"

Working with DMO – Ship Schedules

Flyer and Carson schedule on DMO website



Talk to Teresa Cardoza and Chris Grech

1. Western Flyer/ Rachel Carson

1. When are my ship days? Do I have any control over this?
 1. Request days in proposal
 2. Initial schedule sent out for input late fall/early winter
 3. Schedules can be found: <https://www.mbari.org/at-sea/ships/mbari-all-ships-schedule-2019/> and on CanyonHead
 4. Communicate change requests to Chris Grech, Teresa Cardoza
2. I need to change my ship days
 1. Communicate change requests to Chris/Teresa
 2. VERY hard to change Flyer days
 3. Don't assume maintenance days or days in port are available. Availability depends on a number of factors including crew schedules
 4. There are a number of contingency days factor in each year but as the year progresses the get used up

2. Paragon

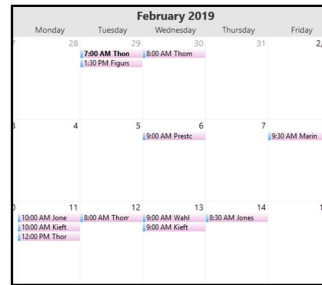
1. When are my ship days?
 1. Request in proposal
 2. Schedule as you go, more fluid not done months in advance
 3. Calendar available through internal MBARI Zimbra *Ships Calendars*
2. I need to change my ship days
 1. Communicate change requests to Teresa or Jared F.
 2. You need to have a captain, read Paragon cruise planning site for list of qualified captains.

3. External Ships

1. In Moss Landing- make sure you have \$\$\$\$ to cover these dates, non-MBARI ship costs come directly out of your expense budget
 1. MLML ships, John Martin and Sheila B (<https://www.mlml.calstate.edu/marineops/>)
 2. Shana Rae (<http://www.shanarae.com/shanarae.html>)
 3. Why would I use one of these boats?
 1. Deployment capability
 2. External collaborators

Working with DMO – Ship Schedules

Paragon Calendar on Zimbra



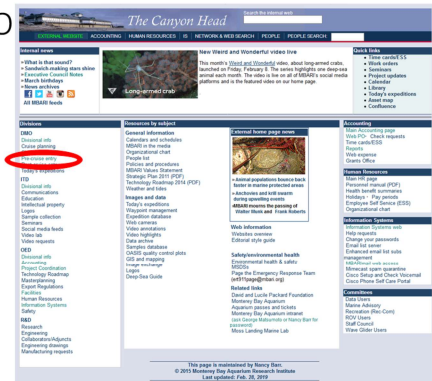
Jared Figurski



Teresa Cardoza

1. Western Flyer/ Rachel Carson
 1. When are my ship days? Do I have any control over this?
 1. Request days in proposal
 2. Initial schedule sent out for input late fall/early winter
 3. Schedules can be found: <https://www.mbari.org/at-sea/ships/mbari-all-ships-schedule-2019/> and on CanyonHead
 4. Communicate change requests to Chris Grech, Teresa Cardoza
 2. I need to change my ship days
 1. Communicate change requests to Chris/Teresa
 2. VERY hard to change Flyer days
 3. Don't assume maintenance days or days in port are available. Availability depends on a number of factors including crew schedules
 4. There are a number of contingency days factor in each year but as the year progresses the get used up
2. Paragon
 1. When are my ship days?
 1. Request in proposal
 2. Schedule as you go, more fluid not done months in advance
 3. Calendar available through internal MBARI Zimbra *Ships Calendars*
 2. I need to change my ship days
 1. Communicate change requests to Teresa or Jared F.
 2. You need to have a captain, read Paragon cruise planning site for list of qualified captains.
3. External Ships
 1. In Moss Landing- make sure you have \$\$\$\$ to cover these dates, non-MBARI ship costs come directly out of your expense budget
 1. MLML ships, John Martin and Sheila B (<https://www.mlml.calstate.edu/marineops/>)
 2. Shana Rae (<http://www.shanarae.com/shanarae.html>)
 3. Why would I use one of these boats?
 1. Deployment capability
 2. External collaborators

Working with DMO – Pre-cruise



From the Canyon Head, in the left column under “DMO” you can access links to:

1. Precruise entry
2. Postcruise entry
3. Ship schedules

Also available externally under At Sea\Ships

Working with DMO – Pre-cruise

Key points:

Submit pre-cruise 2 weeks before your ship day for the Carson and 3 weeks before a Flyer cruise.

Remember ship crew and ROV pilots have no idea what you are planning to do unless you tell them!!

Pre-cruise is necessary but NOT sufficient for complex MOB and operations. Talking to ship crew and pilots is essential.

If you change your plans after the precruise is submitted talk to Teresa.

All fields below must be completed.

Ship name: (Flyer/ Rachel Carson)

Cruise departure date - time: (Local Mass Landing time)

Cruise arrival date - time: (Local Mass Landing time)

Principal investigator: (Project PI extended ship time)

Cruise scientist: (Add all persons to list)

MBARI project number:

[Ship previous information](#)

I. Cruise purpose

Enter objectives for the expedition (required)

Will there be diving operations? ☐ Yes ☒ No

[See manual](#)

If yes, please complete this form: [Ship plan form](#)

NOTE: Ship plans for R/V Rachel Carson are due 2 weeks in advance of cruise.

II. Required equipment description

Check all that apply:

ASV ☐ AUV ☐ CTD ☐ Elevator ☐ MiniROV ☐ ROV ☐ Other ☐

* "Other" - please explain in text area below.

If the Victor Ocean (2020) will be launched or recovered, please indicate in the box below.

* When Victor ocean plans are due then (20 weeks prior to sailing).

NOTE: Planned ROV operations should establish a Local Office to Monitor (LOM) Request 14 days in advance if not under a Standard LOE.

Filling out your precruise should help you pin down the following things:

1. What are you trying to do on your ship day?
2. Where are you going?
3. Whose paying (Project Number)
4. What equipment do you need:
 1. ROV?
 1. What toolsled?
 2. What sampling equipment?
 3. What are you putting on the ROV? How will it interface:
 1. Electrically
 2. Mechanically
 3. Comms
 4. How do you plan to use the ROV during the dives
 2. AUV?
 1. Which one?
 2. Have you planned the mission with the AUV team?
 3. MiniROV (control van?), CTD, Other
 4. Do you need a special winch?
5. Does your work involve haz mat? Itar? Isotopes?
6. Whose coming? Any foreign nationals?
7. Does MBARI (Mandy) have permits in place for your activities?
8. Have you checked the start/end time/tides?
9. Do you have/need extended ops?
10. For Flyer, who has a TWIC card?
11. Do you need seawater, cold room, dark room, are you scuba diving?

Use the wonderful CRUISE PLANNING link for far more info:

<https://www.mbari.org/at-sea/cruise-planning/>

Working with DMO - MOB

- Do you need a MOB day? Do you need a deMOB day? Do you have one scheduled?
- ***Engage the pilots and ship crew well before the morning of your MOB day***, don't expect to "figure it out" on your MOB day
- Even though it is "your" MOB day, you may not have the whole day to do just your work, MOB'ing can be delayed by sled changes, crew availability, etc.
- Very important to make crew and pilots aware of any large equipment/vehicles that needs to be craned on the ship.
- If your cruise plan is late, please let DMO know you are working on it.

- Do you need a MOB day? Do you need a deMOB day? Do you have one scheduled?
- ***Engage the pilots and ship crew well before the morning of your MOB day***, don't expect to "figure it out" on your MOB day
- Even though it is "your" MOB day, you may not have the whole day to do just your work, MOB'ing can be delayed by sled changes, crew availability, etc.
- Very important to make crew and pilots aware of any large equipment/vehicles that require a crane.

Working with DMO - MOB

- Crew/Pilots like:
 - Advanced warning
 - Knowing what the plan is
 - Having a schedule and sticking to it
 - If there is a problem, let them know and allow them to be involved in the solution

Aaron Gregg,
Carson Captain



DJ and Mike B,
Ventana Pilots



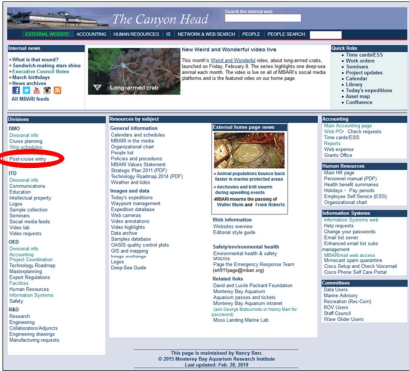
Andrew McKee,
Flyer Captain



Knute Brekke,
Ricketts Chief Pilot



DMO- Post Cruise



DMO- Post Cruise

If it has been more than 30 days you will need to do an "Advanced search" to find your days.

The screenshot shows the Expedition Database website. It has a dark blue header with the title 'Expedition Database'. Below the header, there's a sidebar on the left with links: 'Expedition Database', 'Pre-cruise entry', 'Reports', 'Data products', and 'DMO cruise planning'. The main content area has several sections: 'Upcoming cruises' with a table listing 'R/V Rachel Carson', 'R/V Western Flyer', and 'R/V Pargues'; 'Recent cruises' with a table listing 'R/V Rachel Carson', 'R/V Western Flyer', and 'R/V Pargues'; 'Search expeditions' with a search bar and a 'Search' button; and 'Pre-cruise planning and post-cruise reports' with links for 'About pre-cruise planning', 'About post-cruise reports', and 'If you have questions'. The footer mentions 'Last updated: Oct 20, 2019'.

- It is part of good MBARI citizenship to file a post cruise report.
- Post cruise reports keep the expedition database current and consistent, thereby making it a more useful resource for all at MBARI.
- Dive start and end times are manually entered by video lab staff.
- Once these are entered there are a number of data products that become automatically linked and organized.
 - Data products include frame grabs, video annotations, samples database, 3D replay.
 - Visual bars will display to indicate if VARS images or cool pix images are available, and if pilot's log and CTD data line up correctly

- Please fill out your postcruise within 10 working days after returning to shore.
- Change all brown text
- Post cruise reports keep the expedition database current and consistent, thereby making it a more useful resource for all at MBARI.

22

Accounting Contacts

Purchase Orders Expense Reports Cash Receipts Credit Applications Visa Credit Card Administration	Kathy Bevard purchasing@mbari.org	x1722 A116
Accounts Payable Petty Cash Check Requests Expense Reports	Gail Escobar accountspayable@mbari.org	x2022 A118
Payroll Employee Reimbursements Payroll Tax Reporting Payroll Transfers	Judy Nelson payroll@mbari.org	x1760 A127
Grants - Proposals / Admin Independent Contractor Agreements Invoicing	Danielle Haddock grants@mbari.org	x1803 A251
Financial Reporting Wire Transfers Audit Coordination Fixed Asset Accounting Budget Transfer Requests Cost Pool Calculations	Chris Di Salvo	x1788 A117
Accounting Operations Manager Costpoint Operations Cognos Reporting	Karen Lash	x1813 A126
C.F.O.	Basilio Martinez	x1731 A206