

Project Critical Incidents and Decision Matrix Activity

Sequence

- Part 1 – Past Incidents (Years 1-3)
- Part 2 – Future Milestones (Years 4 and 5)
- Part 3 – Future Anticipated Challenges/Issues (Years 4-5)
- Part 4 – Decision Matrix
- Part 5 – Action Planning in Response to the Decision Matrix

1. Past Incidents - Years 1 - 3

Consider significant incidents – including moments, key decisions, key events/activities, or turning points - that shaped where the project is today.

- Jot them individually below. Discuss with others.
- Share/Discuss - Each team shares its noted past incidents.

Date / Timeframe	Past Incident	Why was it significant?

2. Future Milestones – Years 4-5

What upcoming milestones does your team want to accomplish as part of this project?

Milestone – Completion of a key activity, task, or event.

- Jot them individually below.
- Share/Discuss - Each team shares its future milestones.

Date / Timeframe	Milestone	Why does it matter?

3. Future Anticipated Challenges/Issues – Year 5

What challenges/issues do you anticipate will affect your team's work, the attainment of milestones, or the work of the project?

Challenge/Issue – Some aspect of the work of your task team or project that could impede progress or prevent you/your task team from achieving your milestones.

Here is a range of categories of potential challenges/issues that could impede your progress, for you to also consider:

- 1. Communication & Coordination** - Encompasses barriers in information sharing, clarity of roles, and collaboration across teams, institutions, or partners—often compounded by technology or geographic distance.
- 2. Staffing & Capacity** - Includes challenges related to hiring, retaining, and engaging qualified personnel, managing turnover, and ensuring sufficient expertise and time to meet project goals.
- 3. Project Management & Implementation** - Covers planning, task coordination, timeline management, and documentation issues that can lead to delays, overextension, or loss of focus and momentum.
- 4. Institutional Processes & Support** - Involves bureaucratic hurdles, limited administrative support, restrictive policies, or insufficient institutional resources that affect project execution.
- 5. Resources, Equipment & Infrastructure** - Addresses the availability, reliability, and timeliness of obtaining necessary equipment, software, or materials—and the adequacy of systems supporting project activities.

6. Collaboration & Partnerships - Reflects challenges in maintaining productive relationships across organizations, such as differing goals, uneven engagement, or turnover among key collaborators.

7. Data & Compliance - Includes data collection, privacy, and sharing challenges, as well as regulatory requirements (e.g., IRB, grant compliance) that may slow progress.

8. Participant Engagement & Recruitment - Captures difficulties in reaching, enrolling, and retaining target participants—especially among ideal groups or when external factors reduce participation.

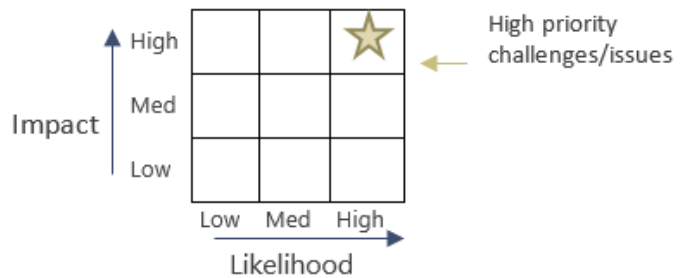
9. External & Environmental Factors - Includes factors beyond project control—such as weather events, public health crises, policy changes, or shifts in economic or technological contexts—that can disrupt progress.

- Jot them individually below.
- **At this point, there should be no discussion about solutions. It is tempting to shift quickly to solutions once a challenge or issue is mentioned, but you risk missing other real and important challenges/issues.**
- Share/Discuss - Each task team shares its anticipated challenges/issues.

Date / Timeframe	Challenges/Issues	Why might it matter?

4. Decision Matrix

- Using the anticipated challenges/issues that your team has identified, assess each challenge/issue in terms of its potential impact (low, medium, high) and likelihood (low, medium, high) using a matrix like the one shown.
- Share/Discuss - Each team will share its high priority challenges/issues.



5. Action Planning in Response to the Decision Matrix

- Action Planning – As a team, consider each of the high-priority challenges/issues your team faces and develop initial action plans to address each.
- Share/Discuss - Each team shares its action plans.