BUILDING RESEARCH DEVELOPMENT INFRASTRUCTURE:
THE IMPORTANCE OF PROJECT MANAGEMENT AS RESPONSIBILITIES GROW

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OUR CHALLENGE: BALANCING PROPOSAL SUPPORT WITH ONGOING ACTIVITIES

What We Strive For:
RESEARCH DEVELOPMENT ACTIVITIES
PROPOSAL SUPPORT

What We Get:
ACTIVITIES
DEVELOPMENT
RESEARCH
PROPOSAL SUPPORT

NIH R01 CHECKLIST: PI Dr. Smith; Agency Deadline June 5; Internal Deadline May 31

PROPOSAL ELEMENT	TO COMPLETE	NOTES	PERSON
Facilities *Template available*	Address Laboratory, Clinical, Animal, Computer, Office, Other Resources	Description of environment, specific to proposed project	PI to provide information; ORD to draft
Senior/key person profile *Template available*	Data entry Biosketches	Each PI & key person Biosketches include personal statement	DRA to enter PI to provide info; ORD to draft
Budget	Budget Budget justification	Either modular or full See SF424 directions	DRA to create ORD to draft
Research Plan *Detailed outline available*	1. Introduction 2. Specific Aims 3. Research Strategy	Resubmission only 1 page limit 12 page limit	PI to draft; ORD to provide edits

ONGOING INITIATIVE: 3-MONTH TIMELINE; HIGH PRIORITY

INITIATIVE/ GOAL	LEAD/ TEAM	BENCHMARK	TIMELINE	RESOURCE NEEDS
Research highlights/ provide institutional officials with snapshot of high-profile research	Assistant director/ ORD Coordinator; RD specialist; dept research admins	1. Identify federal priorities	Month 1	Gov't relations agency
		2. Identify institutional priorities and relevant faculty	Month 2	Research deans; additional ORD staff
		3. Prioritize areas of focus	Month 2	ORD director; VPR
		4. Draft of research descriptions	Month 3	ORD coordinator; relevant faculty for review
		5. Finalize research descriptions	Month 3	ORD coordinator; print shop

NIH P50, PI DR. SMITH; AGENCY DEADLINE JUNE 5; INTERNAL DEADLINE MAY 31

PROJECT→ COMPONENT↓	OVERALL	ADMIN CORE	RESEARCH CORE	RESEARCH PROJECT 1	RESEARCH PROJECT 2
Project Summary	UPLOADED	UPLOADED	UPLOADED	UPLOADED	UPLOADED
Budget	UPLOADED	Dr. Smith; under revision	UPLOADED	Pending – Tuesday PM	Received; ORD uploading
Justification	N/A	Complete; ORD uploading	UPLOADED	Draft pending – Tuesday PM	Received; ORD revising
Specific Aims	Pending – Tues PM/Wed AM	UPLOADED	UPLOADED	Received; ORD revising	Draft pending – Wed AM
Research Strategy	Pending – Wed AM/PM	UPLOADED	Received; ORD revising	Received; ORD revising	Draft Pending – Wed PM

KEY: Green text: draft finalized; Green shading: uploaded; Red text: waiting for researchers; Blue text: in ORD's hands. This chart provides a snapshot of the status of each component, and who is responsible for the next steps in completing the project. This chart requires regular communication among the ORD team and the researchers.

MANAGING PROPOSALS

STEP 1: GET BUY-IN FOR PROJECT MANAGEMENT
- **Goals for "Project Management Light":**
  - Ensure that all team members know their roles & responsibilities
  - Articulate expectations for internal timelines
  - Increase efficiency and decrease last-minute work
  - *Should not* add administrative burden to faculty
  - *Should* be easily adaptable to any funding opportunity

STEP 2: DEVELOP PROJECT MANAGEMENT TOOLS
- **Checklist:**
  - One checklist used for external purposes (*see top figure*) that outlines project requirements and roles/responsibilities
    - Particularly useful for smaller proposals
  - One checklist used for internal purposes (*see bottom figure*) that allows ORD staff to track progress
    - Particularly useful for multi-project applications with many inputs
- **Timelines:**
  - Determine how much time you have prior to internal deadline
  - Establish type and number of inputs for required outputs
  - Determine resources available to complete tasks
  - Don't forget university holidays, team member vacations/travel

STEP 3: IMPLEMENTATION
- **Initial Meeting:**
  - Include principal investigator and invite administrative support if available
  - Use checklist as a guide to articulate roles and responsibilities and expectations of services provided
- **Follow Up:**
  - Email checklist & timeline to all proposal team members and ask for corrections
  - Use timeline to follow up for needed inputs
  - Use checklist to ensure that all elements are complete

MANAGING ONGOING ACTIVITIES

STEP 1: DETERMINE OFFICE METRICS
- **How are your office accomplishments measured?**
  - Work with upper administration to understand the expectations
  - Guide that conversation by understanding your impacts and your strengths

STEP 2: PRIORITIZE RESEARCH DEVELOPMENT ACTIVITIES
- **Use metrics to prioritize activities**
  - None of us can do everything
- **Identify leadership and recruit resources**
  - Use interests and expertise to assign projects – one staff member should lead the initiative and report on progress
  - Recruit resources from outside research development, if necessary: Research administrators, deans, librarians, faculty partners
    - Example: Departmental research administrators may be able to identify faculty for high-priority proposals

STEP 3: ESTABLISH BENCHMARKS & MILESTONES
- **Set expectations**
  - Everyone needs to know what needs to be done and by when
  - Break down ongoing activities into achievable milestones that can be worked toward during and between proposals
  - Use institutional priorities to set benchmarks to ensure that metrics are met

STEP 4: MAINTAIN ACCOUNTABILITY
- **Hold regular meetings with research development team**
  - Discuss progress and challenges
  - Brainstorm creative solutions for increasing efficiency, balancing on-going activities with proposals, and achieving metrics
- **Use electronic tools to track progress**
  - Tracking tools should be available to all members of the research development team (e.g., Google docs spreadsheet, shared Excel file, project management software)
  - Tools should include long-term goal (title of activity), milestones with deadlines, leader, notes toward progress