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TRAINING MATERIALS

Training Guide: Introduction to Research Project Management

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Training Guide: Introduction to Research Project Management

Well run research projects use a project management methodology to ensure that the purpose and scope of the project, team roles and responsibilities, and the timeline for the different activities, milestones and deliverables are clear to all involved. Project management helps a team work well, stay focused and deliver research on time. Whatever your role in the research team, it is good to know a little about project management so you can use the tools to help you best do your job (and keep others on track)!

As a co-researcher, there might come a time where you are asked to oversee a research project or activity. When this happens, it is important that you are able to implement effective project management skills, as this will help you and your team keep organised and on-top of your project objectives and deadlines. This guide is designed to provide you with some introductory strategies and skills to help you on your way.

Planning

Research projects are often very complex and the exact outcome is difficult to plan for. This is the nature of research as we cannot ever be sure what we will uncover! Research projects are often influenced by factors beyond our control and it is common for the research process to be disordered. Things can go wrong as often as they go right, but planning, with continuous adjustment and adaptation, will help you to reach your milestones and complete the project within the expected time-frame. Some questions you should consider when planning research include:

→ **What are the research objectives of the project?**

This is important because the research objectives will inform the scope of your project such as timelines and budgets.

→ **What are the resources available?**

Research design and activities often need to be planned with the available resources in mind.

Limited funding or people to work on a project will require you to make decisions about how many meetings are held, how much data is collected, how thoroughly it is analysed, how many outputs are produced and how these are disseminated. It is important to remind team members about the scope of the project to ensure that you do not have problems with budget, or completing a project that goes beyond the original plan.

→ **What are the major milestones I will need to complete?**

Milestones might consist of getting ethics approval, completing data collection, drafting a report, submitting a publication, etc.

Break each of these milestones down into the specific tasks that you and your team will need to complete to reach them.

→ **How much time will I need to reach each milestone and complete each activity?**

Make realistic estimates of how long it will take to complete each task.

Consider the particular method of data collection you are using, as some types of data will take longer to analyse than others. You should also think about what kinds of resources you will need to complete certain activities, e.g. software, support from other researchers. Also consider any time periods where you won't be working, e.g. over holidays. It is always good practice to add in extra 'buffer time', in case things take longer than you think!

→ **How are the different aspects of the project interrelated?**

This will help to adjust time-frames and identify any roadblocks you might encounter along the way.

For instance, do you need to complete fieldwork before you undertake analysis?

To plan out a research project, you could use a Gantt Chart – this is a type of bar chart that illustrates a project's schedule. The chart allows for organising and viewing project activities and tasks against pre-established timeframes, and is useful for tracking progress. It can also be tweaked along the way to account for any changes that may arise. To develop a Gantt Chart, brainstorm all the milestones, the activities required for each milestone, and estimate how much time you will need.

Project management tool: Check out the Co-research Toolkit Gantt Chart template **here**. You can make a copy to edit the template.

Problem-solving and creative thinking

Things will not always go according to plan, and effective project management will require problem-solving and creative thinking in these situations. If confronted with a challenge, brainstorm any possible solutions that you could put into practice to overcome it. Ask yourself: 'How do we get to the end goal?'; 'Are there any alternatives?'.

Teamwork

Teamwork really does make the dream work. It is key to ensuring that your project runs smoothly and that resources are well-managed. Work with your team to plan out the research activities and assign responsibilities. Consider setting up weekly check-in meetings with the team to discuss your work, review the project timeline, and provide each other with support.

Clear communication

Having good and clear internal communication with your research team will keep confusion to a minimum, allowing the project to progress more smoothly and with less delays. To facilitate this, you might consider setting up a team channel on Slack, Discord or Microsoft Teams where your team can post updates about how the project is progressing and what still needs to be done. Ensuring that everyone has access to the information and resources they need to deliver their part of the project is important. Regular meetings that check on progress and identify any problems or risks can also help.

Other key skills and qualities for research project management include:

→ **Effective decision-making. This article** includes some good strategies and things to think about when approaching decision-making, including some of the things you should avoid.

→ **Flexibility.** The best project managers will be adaptable to changes and developments that arise along the way. Whilst planning for these changes is not always possible (after all, some things can be totally unpredictable!), you might find it helpful to identify in advance the aspects of the project that you estimate will be the most likely to change in the future and give yourself some extra buffer time in your schedule to adapt. **This webpage gives some useful tips.**

→ **Ability to prioritise.** Prioritisation isn't always an easy thing to do, but it's an important part of being able to manage a project successfully. Luckily, there's a lot of things you can do to make the process of prioritising easier for yourself. **This blog provides 9 different techniques** that can aid you on your journey to mastering the art of prioritisation.

→ **Transparency.** Be honest and clearly communicate with your team, and other stakeholders, about the project's progress. Let others know if deadlines are missed, why, and work together to re-negotiate these.

→ **Ability to regularly review progress and address any successes or failures.** At the end of a milestone or project, you might consider bringing the team together to review what went well, what didn't go so well or what was challenging. You could use a retrospective meeting template on **Miro** for online meetings to celebrate your achievements, and document any learnings. By identifying what areas you will need to work on with your team, you can actively improve your team's performance and level of efficiency going into the future.