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 PROPOSALS

<table>
<thead>
<tr>
<th>PROPOSAL ELEMENT</th>
<th>TO COMPLETE</th>
<th>NOTES</th>
<th>PERSON</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facilities</td>
<td>Address Laboratory, Clinical, Animal, Computer, Office, Other Resources</td>
<td>Description of environment, specific to proposed project</td>
<td>PI to provide information; ORD to draft</td>
</tr>
<tr>
<td>Senior/key person profile</td>
<td>Data entry</td>
<td>Each PI &amp; key person</td>
<td>DRA to enter</td>
</tr>
<tr>
<td>Template available</td>
<td>Biosketches</td>
<td>Biosketches include personal statement</td>
<td>PI to provide info; ORD to draft</td>
</tr>
<tr>
<td>Budget</td>
<td>Budget</td>
<td>Either modular or full See SF424 directions</td>
<td>DRA to create</td>
</tr>
<tr>
<td>Research Plan</td>
<td>Budget justification</td>
<td>Budget justification</td>
<td>ORD to draft</td>
</tr>
</tbody>
</table>

| RESEARCH | ACTIVITIES | MANAGEMENT | ONGOING INITIATIVE | GOALS/HANDLING | HIGH PRIORITY |
|----------|------------|------------|-------------------|----------------|
| INITIATIVE/ GOAL | START | END | LEAD/ TEAM | BENCHMARK | TIMELINE | RESOURCE |
| Research highlights / provide institutional officials with snapshot of high-profile research | ASSISTANT DIRECTOR/ORD COORDINATOR | RD SPECIALIST | RESEARCH ADMIN | 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 |

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 these mean 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

Contact Information
Amy Gantt, MA, Director
Office of Research Development
Office of the Vice Provost for Research
Tufts University
6th Harrison Ave, Boston, MA 02115
Tel. +1(617) 636-2792; Email: amy.gantt@tufts.edu
Twitter: @TuftsORD

Acknowledgements: I would like to acknowledge the contributions of my colleagues in the Tufts University Office of Research Development to the contents and design of this poster, and for their contributions to the ORD’s project management: Barbara Eisenhour, Susan Lewis, Sarah Martin, Laura Schmidt, Laura Edick, and Tyler Manoushek.