



NED 2025

Networking to Enhance Development

ITHS

Institute of Translational Health Sciences

ACCELERATING RESEARCH. IMPROVING HEALTH.

NED 2025



SLIDO
#8206536

PROJECT MANAGEMENT AND ORGANIZATION FOR RESEARCH COORDINATORS

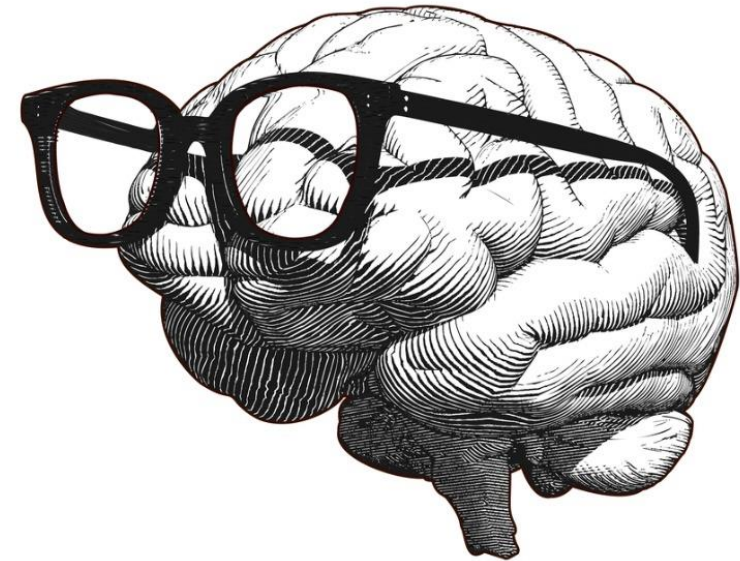
Caitie Hawley, MSPH

Project Manager

Treuman Katz Center for Pediatric Bioethics and Palliative Care
Seattle Children's Research Institute

Goals of this session

- Understand how project management approaches and concepts such as the “triple constraint” and “scope creep” can help you manage your workload as a research coordinator.
- Identify tools and strategies that can help you stay organized and productive.





How many projects do you work on?

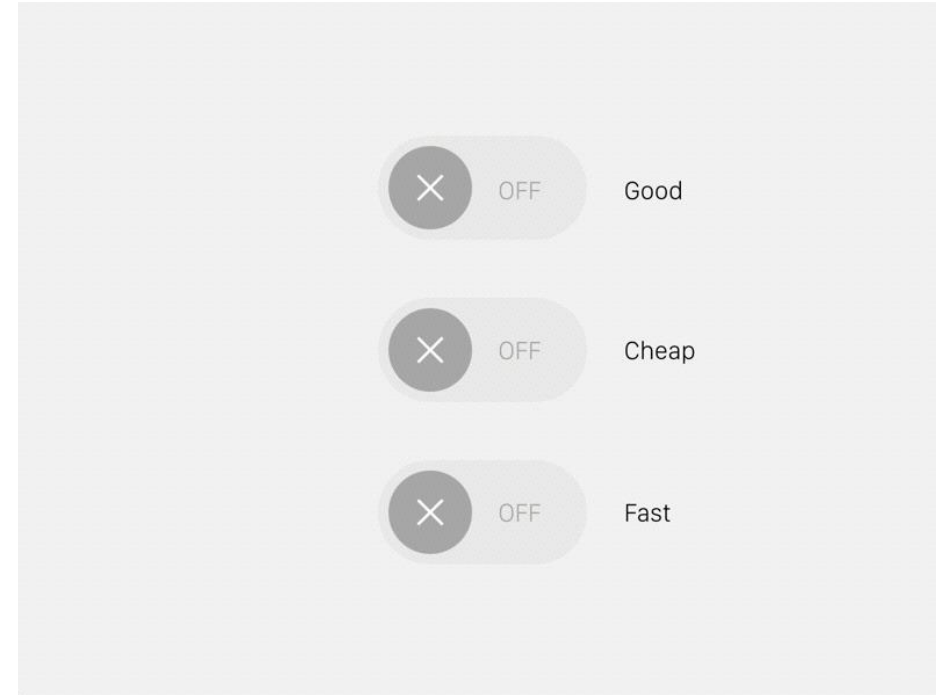
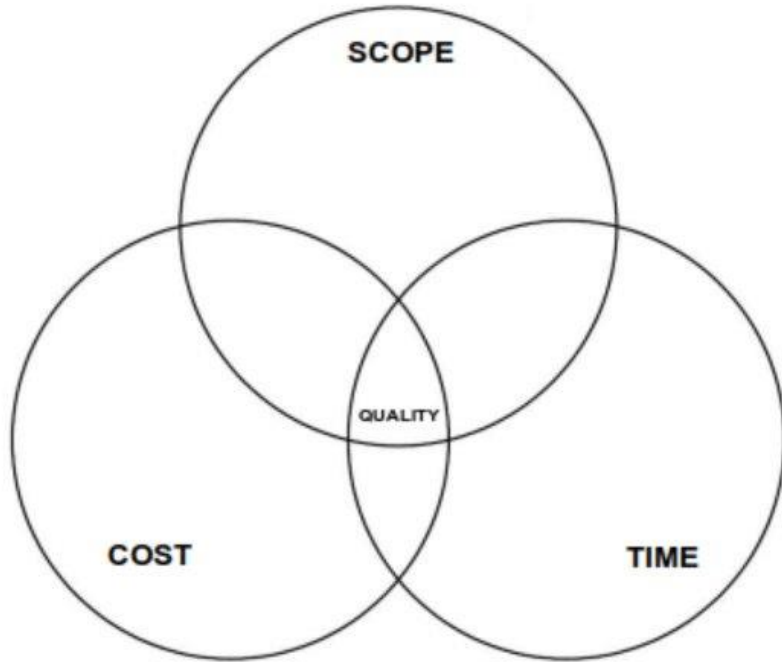
About me





What is project management

Triple Constraint



Real life example: Your PI has asked you to take on more responsibilities to add to your already full workload. What are some of the implications of this ask? How would you respond?

Scope Creep





What are some of the tasks you are asked to do in your current role?

Are you planning or are you reacting?

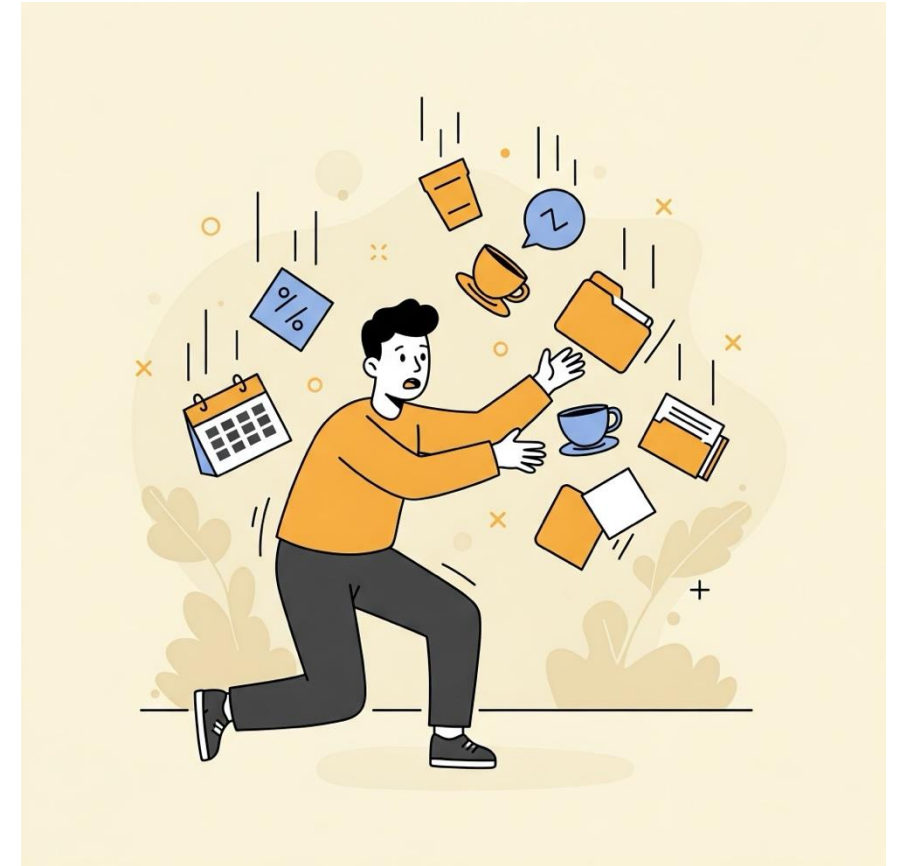
- Why plan?
- Tips:
 - Plan on a Friday afternoon (or another set time each week)
 - Make your plan flexible
 - Consider your personal life
 - Notice and adjust as you execute



The Lazy Genius Podcast: #407 How to Create a Flexible Weekly Plan

Talk about a time you missed something

- What did you miss? How did you realize you missed it? What were the consequences?
- How did you feel?
- How did you adjust to avoid letting it happen again?





**Which of these tools have you used
to stay organized?**

Managing tasks



Things that tools can be helpful for:

- Task management/assignment (i.e. Trello, Asana, Planner, Outlook, paper planner)
- Project organization (i.e. Smartsheet)
- Communication (i.e. Teams, Outlook)
- Collaboration (i.e. Loop)
- Note taking (i.e. OneNote)

My task management strategy

- Create tasks in **Microsoft Planner**
 - Plus: Integration with Outlook, Loop, Teams, etc.
 - Only 1 of my PIs wants to use this as a team tool
- Collaboration, project organization, and note-taking in **Microsoft Loop**
 - Plus: Visually appealing, not much work is required to make it pretty, real time integration with Outlook, Planner, OneDrive, Teams, etc.
 - Downside: Can only be shared within organization; buggy; not for people who are “technologically challenged”

My Day

My Tasks

My Plans

Pinned

Bogetz Projects

Admin

Weiss Projects

MacDuffie Projects

All Private tasks Assigned to me Flagged emails

Filters (2) Group by Due date

Today

Tomorrow

This week

Next week

Future

Follow up
Admin
NED 2025 Presentation Proposal Accepted
04/03 HC

Follow up
Bogetz Projects
seminar for students
04/03 HC

Admin
Admin
Smartsheet
04/03 HC

Follow up
MacDuffie Projects
UW CAB members
04/03 HC

Follow up

Admin
APEN Educational Event: *Introducing: Canva, Creating Polished Presentations! March 25 2025, 12:30-
04/07 HC

Follow up
MacDuffie Projects
CHOP CAB members
04/07 HC

Follow up Blocked Admin
MacDuffie Projects
Columbia IRB
04/07 HC

Writing
MacDuffie Projects
Consent forms
Parents
Providers
Key informants
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04/07 HC

Admin
Please wish th
Endsley a hap
16th!
04/15

Admin
Admin
Next Downto
04/17

Tasks
Send out DELI
04/23

Training
Admin
CRC Jumpstar
04/30

Weiss Lab Meeting 2
Data use agre
and CHOP

+ New plan

Loop

+ Create new

Search

Notifications

Recent

Meeting notes

Workspaces

Personal

My workspace

Recent

Weiss Lab :)

MacDuffie Lab

Caitie and Katie...

MacDuffie Lab | 2

Status

Sorted by hierarchy

IBIS Summer Internship

Contact Information

onboarding

IBIS Summer Internship Pro

IBIS-DS Community Advisory Bc

Point People

CAB Members

Finance People

IBIS-DS CAB Shared Drive

R21

Meeting notes

SERVICE

Relevant papers

Recycle bin

IBIS Summer Internship

Internal

HC

Share

😊 Add cover

IBIS Summer Internship

Key dates

Item	Due date	Notes	Status
1 Letters of Intent (LOI)			Done
2 Full application	Sat, Feb 1 (2mo ago)		Done
3 Review applications with Diversity WG		Use Microsoft forms to collect rankings	Done
4 Decisions	Sat, Mar 1 (1mo ago)		Done
5 Send onboarding email	Mon, Mar 17 (17d ago)		Done
6 Kate initiate consultant payment and submit Outside Work Request form to Jen Kett	Wed, Mar 26 (8d ago)	Link to UW form	Done
7 Meet with Mentor/Mentee	Early April		In progress
8 Process first payment	Early June		Type to add

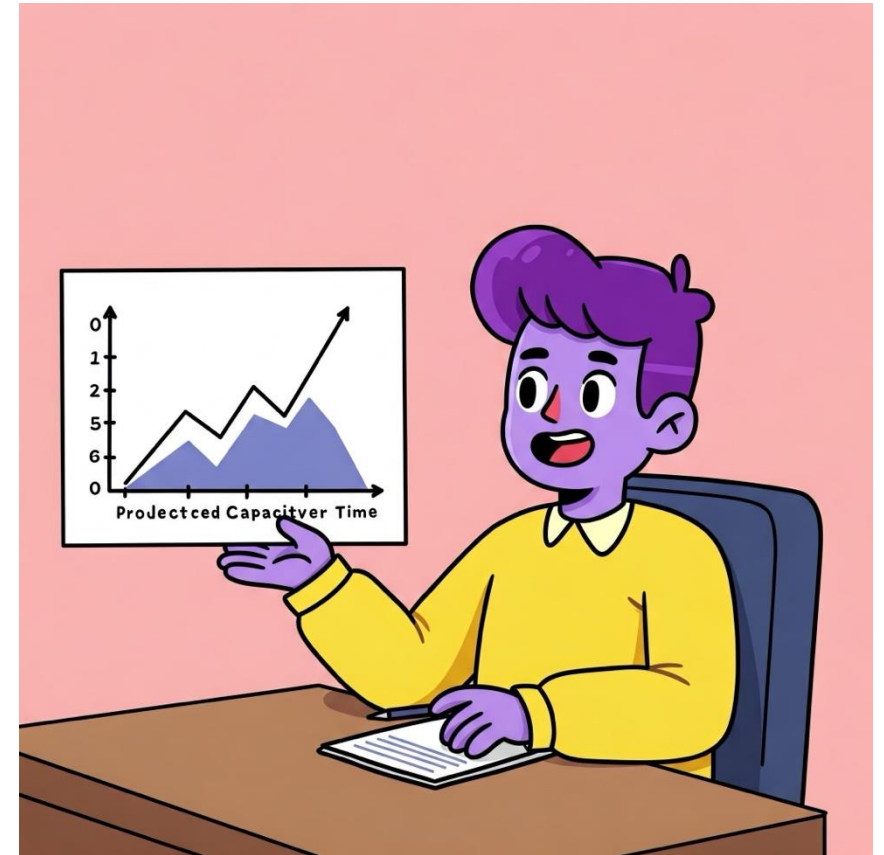
Prioritizing



- If everything is urgent, nothing is
- How to you determine what is important?
 - What kinds of metrics do you use?
- What do you do if you disagree with your PI on what is important or urgent?
 - What if you have multiple PIs?

Forecasting and capacity

- How long will this project/task take?
 - Do you need to schedule a block of time?
- How many people are involved?
 - Are you responsible? Who else is accountable, should be consulted, and needs to be informed?
- Have I done something like this before, or is it a new skill?
 - If new, do you know where to find the resources or help to do this?
- What are the risks of this project increasing in time, budget, scope?
- What else?

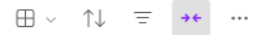


Dashboards and Metrics



Caitie Project Dashboard

Just start typing...



	Investigator	Project	Tags	Type of work	Growth vs. New ...	Comments
1	MacDuffie	Community Advisory Board	Effort : High Priority : High Progress : In progress	Community engagement	Growth	For IBIS-DS
2	MacDuffie	sIRB for SERVICE R01	Effort : High Priority : Medium Progress : In progress	Writing	Growth	Drafting IRB submission, consent forms, setting up reliance agreements, etc
3	MacDuffie	Pediatric Pilot Fund		Type to add	Type to add	Possible ask between now and May
4	MacDuffie	Summer Interns	Effort : Low Effort : Low Progress : Completed	Organization	Growth	Organizing timelines for summer intern program
5	Weiss	Proofing website	Effort : Low Progress : In progress Priority : Low	Research	Growth	
	Weiss	Visiting scholar	Effort : Low	Community engagement	Growth	

Flipping the script



- Building a partnership with your PI
- Proactive vs. reactive
- How have you experienced this in your journey as a research coordinator?

The Future

- How are you using AI or automation to manage and simplify your work?
 - Note taking, scheduling, creating cool graphics for PowerPoint slides
 - Ethical considerations?



Parting words

- Own your strengths, develop your weaknesses. Find your superpower!
- You are important!
- You have a life that matters outside of work.



ADD ME ON LINKEDIN



Caitie Hawley

Committed to advancing health equity and
protecting the most vulnerable



QUESTIONS?