NED 2026

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PROJECT MANAGEMENT FOR RESEARCH COORDINATORS

Caitie Hawley, MSPH
Project Manager
Treuman Katz Center for Pediatric Bioethics and Palliative Care
Seattle Children's Research Institute

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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.



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About me

MIAMI UNIVERSITY REDHAWKS

PEACE CORPS

CEB
WHAT THE BEST COMPANIES DO



W
UNIVERSITY of WASHINGTON

Seattle Children's
HOSPITAL · RESEARCH · FOUNDATION

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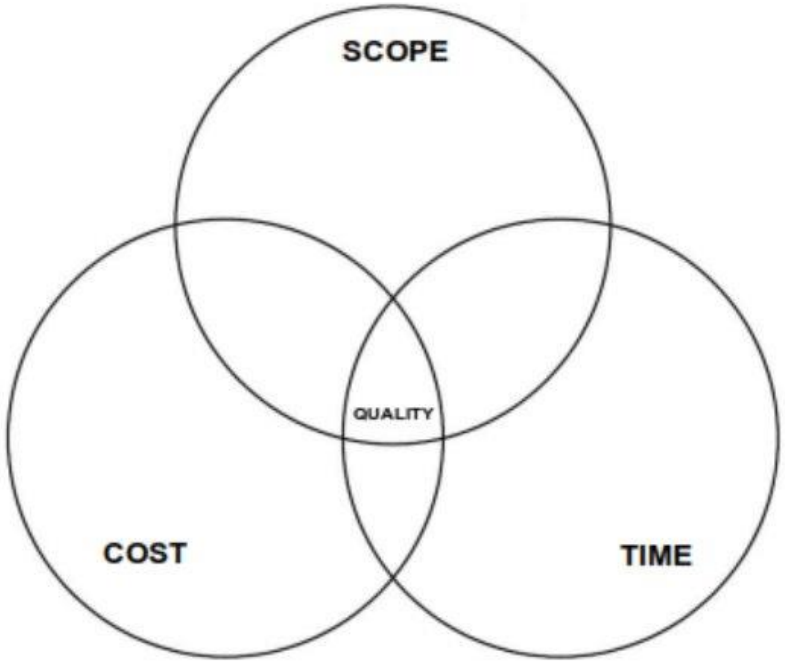
Triple Constraint







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



Are you planning or are you reacting?

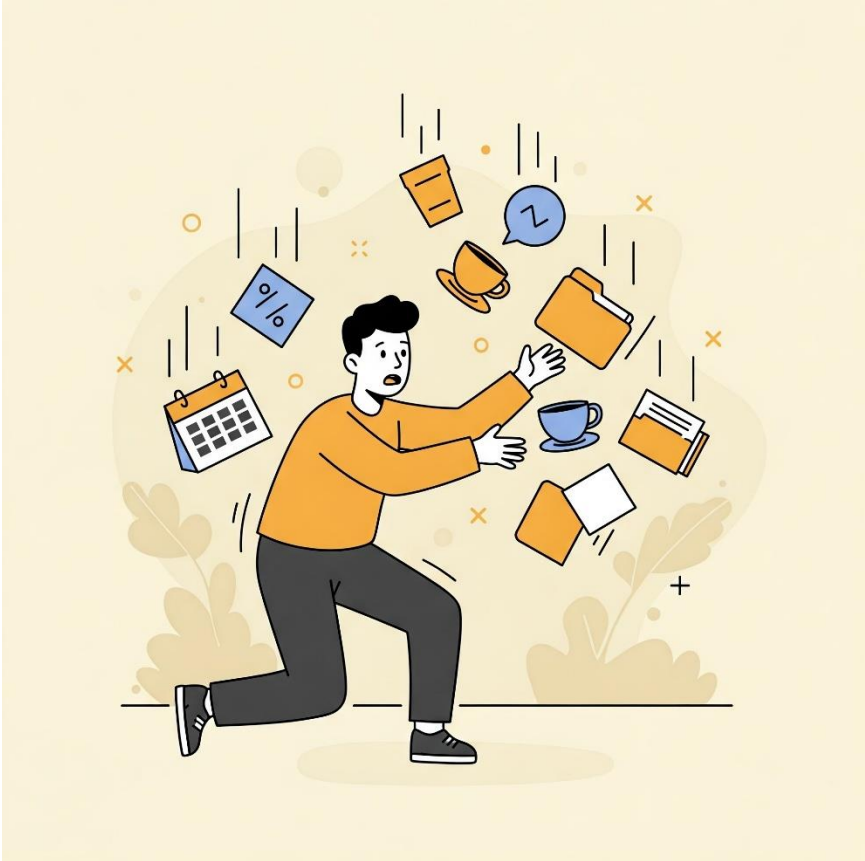
- Why plan?
- Tips:
  - Plan on a Friday afternoon (or another set time each week)
  - Make your plan flexible
  - Consider your personal life
  - Notice and adjust as you execute



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?



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, Lists)
- 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 the organization; buggy; not for people who are “technologically challenged”
- New to me tool: **Microsoft Lists**

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My tasks

Grid | Board | All | Private tasks | Assigned to me | Flagged emails | Group by: Due date

Today

Add task

Low
Admin
Daily check in
09/11

Training
Admin
PMI course
https://www.udemy.com/course/pmp-certi...
1
09/11

Meeting prep
MacDuffie Projects
Prep for meeting with Kate
09/11

Admin

Tomorrow

Add task

Rest of the week

Add task

Next week

Add task

Meeting prep
Weiss Projects
Prep for Weiss team meeting
09/14

MacDuffie Projects
SERVICE materials tracker
09/14

Weiss Projects
students
09/14

Weiss Projects
trisomy GCA things
09/14

Weiss Projects
trisomy LOS
09/14

Future

Add task

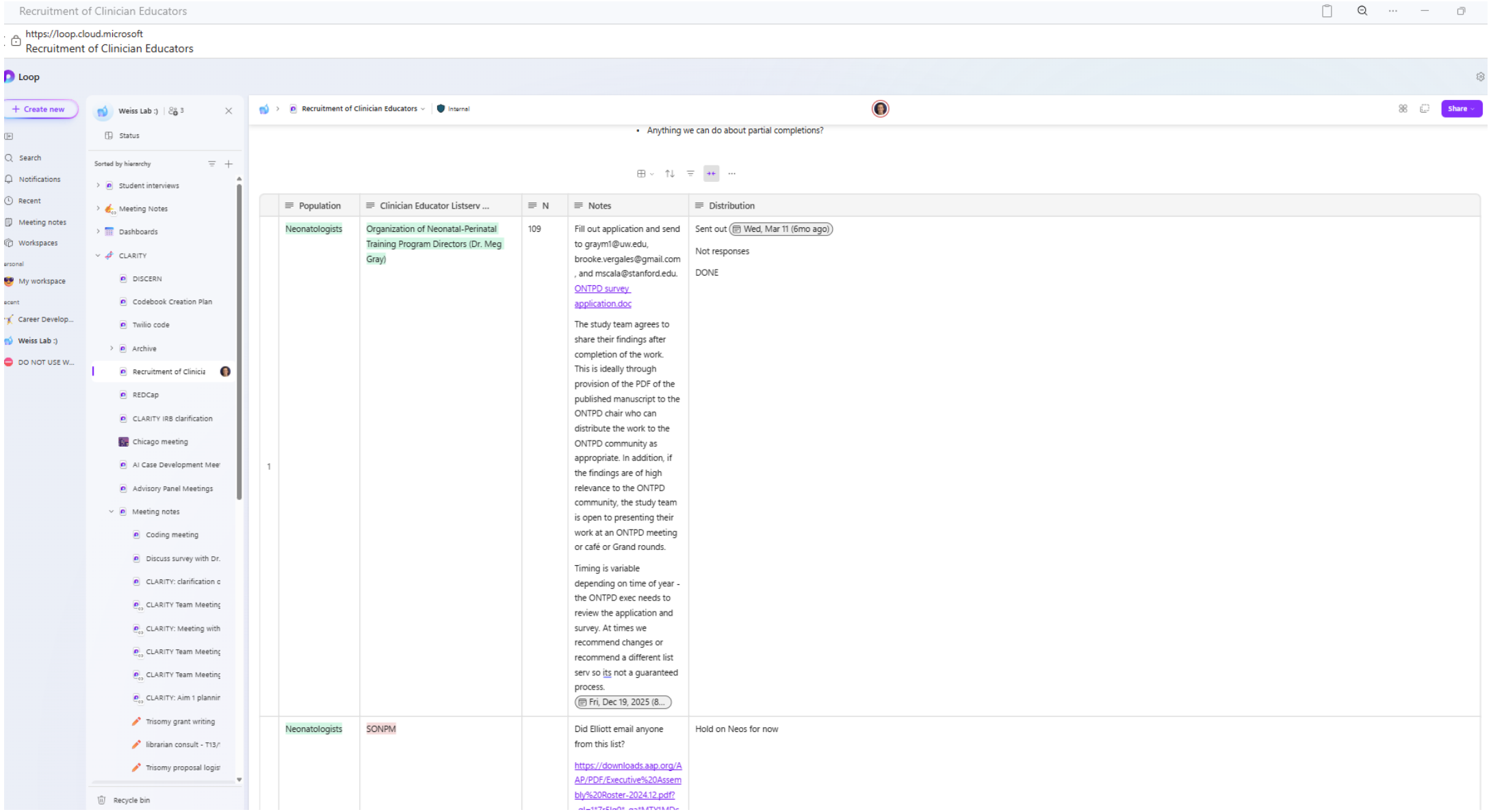
PARTNER Study (R21)
Prep for Co-I meeting
09/21

MacDuffie Projects
Email admins to find time for bimonthly meetings
09/22

MacDuffie Projects
Get w9s from steering committee members
09/22

MacDuffie Projects
prep for ISCRO Co-i meeting
1 / 2
09/22

Weiss Projects
r01 extreme weather planning meeting


Recruitment of Clinician Educators
https://loop.cloud.microsoft
Recruitment of Clinician Educators
Loop
Create new
Search
Notifications
Recent
Meeting notes
Workspaces
My workspace
Career Develop...
Weiss Lab :)
DO NOT USE W...
Weiss Lab :)
Status
Sorted by hierarchy
Student interviews
Meeting Notes
Dashboards
CLARITY
DISCERN
Codebook Creation Plan
Twilio code
Archive
Recruitment of Clinicia
REDCap
CLARITY IRB clarification
Chicago meeting
AI Case Development Mee
Advisory Panel Meetings
Meeting notes
Coding meeting
Discuss survey with Dr.
CLARITY: clarification c
CLARITY Team Meeting
CLARITY: Meeting with
CLARITY Team Meeting
CLARITY Team Meeting
CLARITY: Aim 1 plannir
Trisomy grant writing
librarian consult - T13/
Trisomy proposal logis
Recycle bin
Recruitment of Clinician Educators
Internal
Share
Anything we can do about partial completions?
Population
Clinician Educator Listserv ...
N
Notes
Distribution
1
Neonatologists
Organization of Neonatal-Perinatal Training Program Directors (Dr. Meg Gray)
109
Fill out application and send to graym1@uw.edu, brooke.vergales@gmail.com , and mscala@stanford.edu. ONTPD survey application.doc
The study team agrees to share their findings after completion of the work. This is ideally through provision of the PDF of the published manuscript to the ONTPD chair who can distribute the work to the ONTPD community as appropriate. In addition, if the findings are of high relevance to the ONTPD community, the study team is open to presenting their work at an ONTPD meeting or café or Grand rounds.
Timing is variable depending on time of year - the ONTPD exec needs to review the application and survey. At times we recommend changes or recommend a different list serv so its not a guaranteed process.
Fri, Dec 19, 2025 (8...
Sent out Wed, Mar 11 (6mo ago)
Not responses
DONE
Neonatologists
SONPM
Did Elliott email anyone from this list?
https://downloads.aap.org/AAP/PDF/Executive%20Assembly%20Roster-2024.12.pdf?
Hold on Neos for now

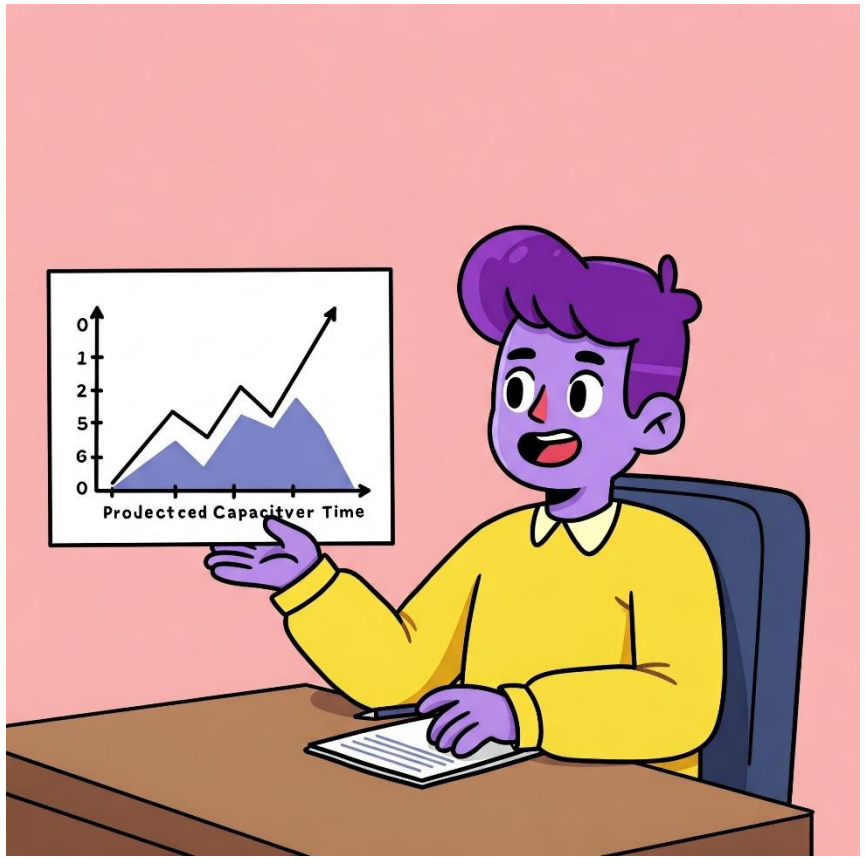
Prioritizing



- 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

Add cover

Caitie Project Dashboard

	Investigator	Project	Tags	Type of work	Growth vs. New skill	Comments
	MacDuffie	SERVICE R01	Effort : High; Priority : High; Progress : In progress	Organization	Growth	Getting data/collaborating with 4 partner studies so lots of external stakeholder coordination/management. Meeting scheduling/reminders/leading/notes/summaries. Managing IRB stuff and regulatory needs. SERVICE competitive revision due Mon, Jul 20 (1mo 22d ago)
2	Weiss	PARTNER	Effort : High; Priority : High; Progress : In progress	Organization	Growth	
3	Weiss	CLARITY	Effort : Medium; Priority : High; Progress : In progress	Organization	Growth	Project planning, task management, meeting scheduling/reminders/notes/summaries. Managing IRB stuff and regulatory needs.
4	MacDuffie	Greenwall	Effort : High; Priority : Medium; Progress : In progress	Type to add	Type to add	
5	Career development	Mentoring/networking	Effort : Medium; Priority : Medium; Progress : In progress	Writing	New skill	Working with my own mentor and mentoring CRCs
6	MacDuffie	Parent EI survey (formally known as PPF)	Effort : Medium; Priority : Medium; Progress : In progress	Organization	Growth	Meeting scheduling/reminders/leading/notes/summaries. Managing IRB stuff and

Applying *Hyperefficient*

Productivity is not about doing more tasks. It's about doing the right work at the right brain state.

Match your work to your mental energy:

- Peak Focus (High Brainpower)
- Moderate Energy
- Lower Energy



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





QUESTIONS?

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