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# All you need to know about project management (...but don't be afraid to ask..)

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NIHR Incubator for ClinEdR x ASME present



# MASTERING THE **BASICS**



WEDNESDAY 21 SEPT 2022



## THE HOSPITIUM

MUSEUM GARDENS, YORK, YO30 7DR

08.30 - 17.00

You have an interest in **Clinical Education Research**, you may even have a **research question**. So how do you go about putting the pieces together to develop your proposal? How can you expect your work to have **impact**?

This one-day 'bootcamp' builds on our '**Mastering the Basics**' webinar series and will guide you through the practicalities of **developing your project**, assembling your **team** and submitting a **funding bid**.

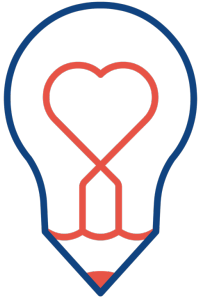
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# Who we are?



## OUR SPEAKERS



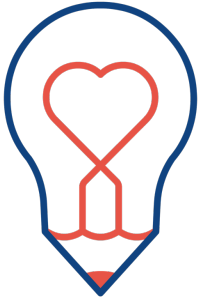
### PROF GABRIELLE FINN

- Vice Dean for Teaching, Learning and Students at the University of Manchester for the Faculty of Biology, Medicine, and Health
- Professor of Medical Education in the School of Medical Sciences
- National Teaching Fellow and Principal Fellow of the Higher Education Academy
- Published over 150 research outputs
- Research interests include fitness to practise, identity, assessment, and gender discrimination

### PROF PAUL TIFFIN

- Professor of Health Services and Workforce Research at the University of York and Hull York Medical School
- Quantitative methodologist seeking to link individual psychological characteristics and outcomes of interest
- Funded via HEFCE and NIHR and previously from Wellcome, the EPSRC and ESRC
- Believes that workforce policies are a 'healthcare technology', worthy of a firm evidence base

# All you need to know about project management



Project management starts with the proposal! Do's and don'ts

**Sorting governance issues at first attempt...**

Public involvement

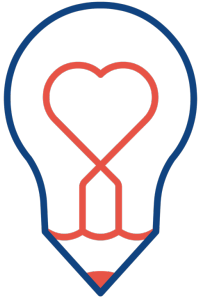
GANTT charts and timelines

Managing your team

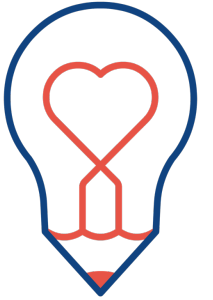
Planning the routine / setting expectations

# Tips #1: Project management starts with the proposal!

- Baking project management in...
- Don't write cheques...you can't ca\$h...



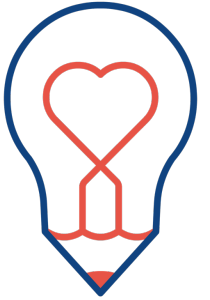
Tips #2:  
Sorting  
governance  
issues at first  
attempt...



- Audit? Service Evaluation?  
Research?

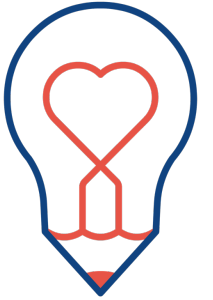
## Tips #2: Sorting governance issues at first attempt...

- Ethical review takes time  
– get it right the first  
time and don't rush
- Involve PPI  
representatives



Tips #3: Public  
involvement  
matters-  
achieve  
| meaningful co-  
production  
through active  
engagement

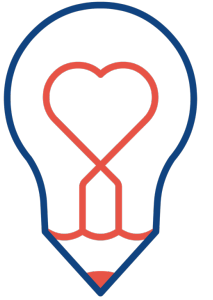
- PPI has to lead to meaningful co-production
- Getting the right people
- Training and supporting them
- PPI starts at project inception!
- Don't conflate external with lay.



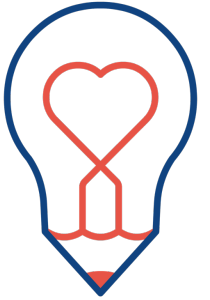


## Tip 4: Use tools to help with project management

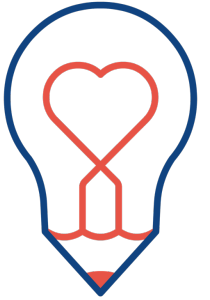
- Many tools exist that can help
- Gantt charts, PERT Charts, RAID logs
- Learn from business sector
- Know the expectations of your funder







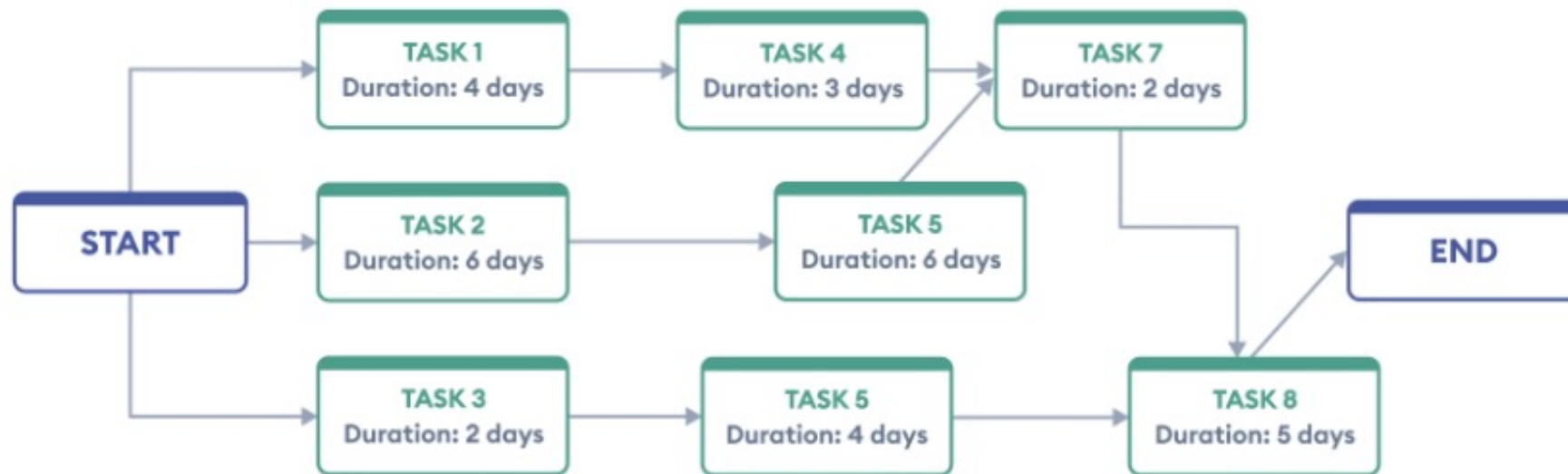
Task	Planned Start	Pre-study	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15
		1-Jan	1	1	1	1	1	1	1	1	1	2	3	4	5	6	7	8	9	10	11	12	13
Steering group meetings	1-Jan-14	█				█				█			█				█				█		
Annual Report Contribution	1-Jan-14												█										
Scoping exercise- Pearson Vue (non-cognitive items)	1-Jan-14		█	█	█								█										
Data collation, management and cleaning for prediction study	1-Apr-14				█	█	█																
Collation of existing non-cognitive data from university databases	1-Apr-14				█	█	█																
Writing protocol for predictive validity study	1-Jun-13					█	█																
Developing and testing methodology for non-cognitive study	1-May-13				█	█	█	█	█	█	█	█	█	█									
Data exploration and analysis for non-cognitive study	1-Oct-13									█	█	█	█	█	█	█	█	█	█				

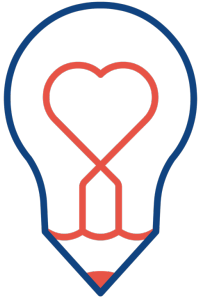


# Other tools - PERT chart

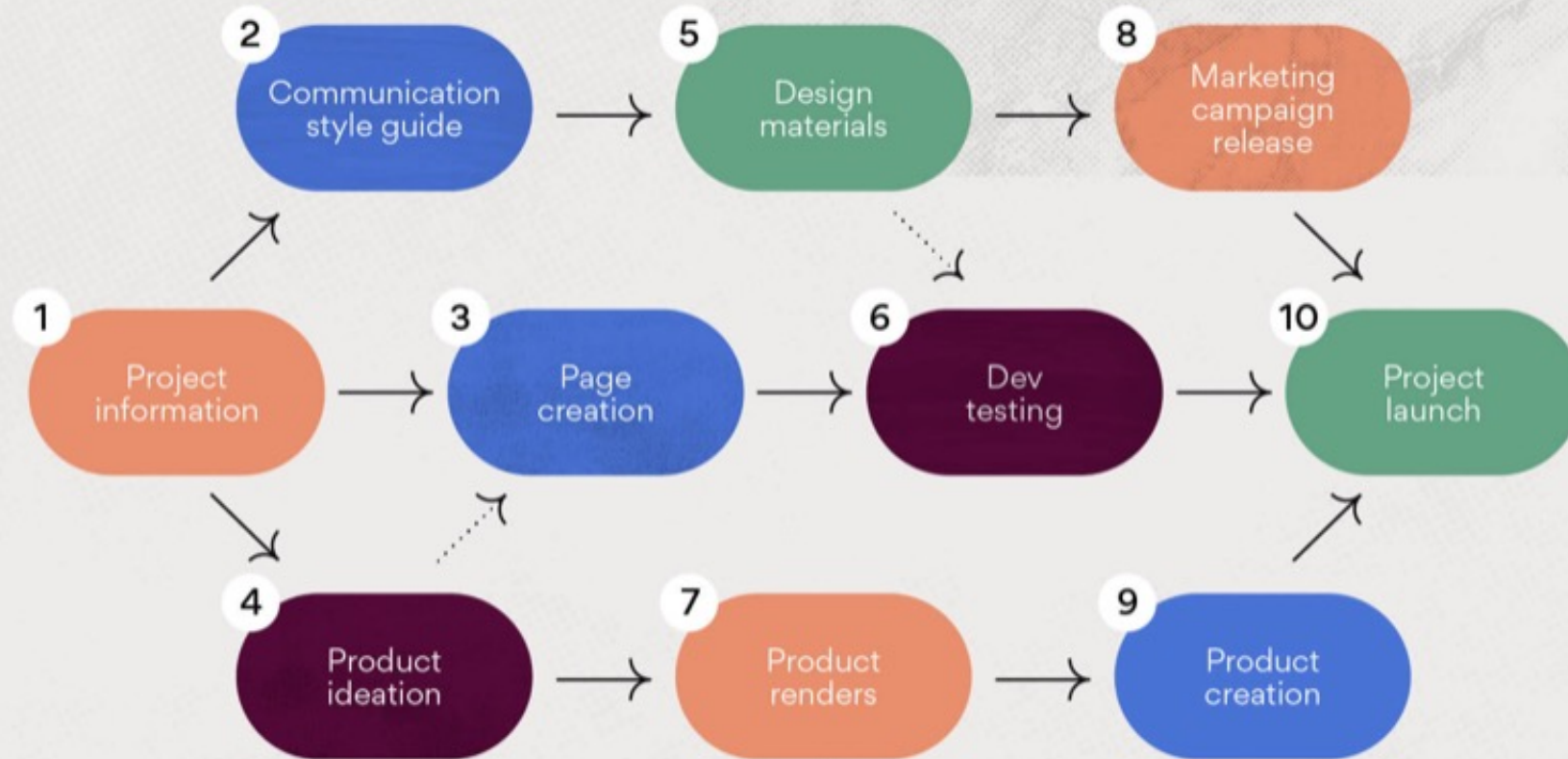
## PERT Chart Example

PERT charts are flowcharts that display project tasks in separate boxes. Dependencies are connected with arrows between the boxes.





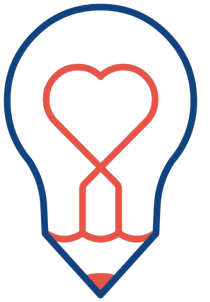
# PERT chart example



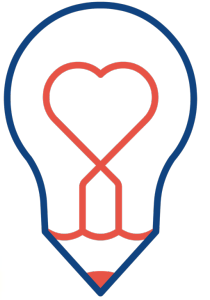
Tasks:

Dependencies:

Dependencies without resources:



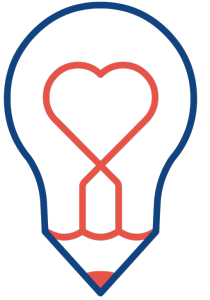
	<b>PERT chart</b>	<b>Gantt chart</b>
Scope	Useful in planning	Often more helpful once project underway
Use	Not routinely used but increasing in popularity	Used routinely / expected
Flexibility	Less flexible as hard to change mid-project	Easy to adjust and track project
Format	Flow chart Easy to view at a glance	Bar chart More exhaustive – lots of scrolling!



# RAID logs/ registers

- R - risks
- A- assumptions
- I - issues
- D- dependencies

RAID SUMMARY							
Risks		Assumptions		Issues		Dependencies	
Total Risk #		Total Assumption #		Total Issue #		Total Dependency #	
5		5		6		6	
Risk Level		Criticality		Priority		Priority	
2	Low	1	Low	3	Low	3	Low
1	Medium	2	Medium	0	Medium	1	Medium
1	High	1	High	1	High	1	High
1	Critical	1	Critical	2	Critical	1	Critical



Some people use simpler RAG rating- **red**, **amber**, **green**

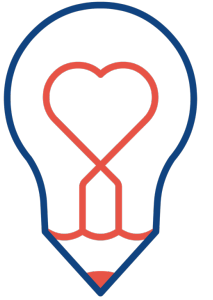
Progress Update		Status	Rationale / Escalations	Return to green strategy
Milestones /Outputs	=	Red	Red	
Resources	=	Red	Issu	
Costs	=	Amber	Bud	
Change vibe / temperature check	=	Amber	Ope	
Benefits / Outcomes	=	Amber	Ben	
Dependencies	=	Red	The	

Provide (1) rationale/ escalation routes, and (2) return to green strategy



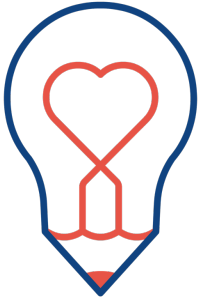
## Tip 5: Don't be afraid to manage upwards and downwards

- Make your expectations of advisors clear
- Set realistic but firm deadlines
- Ask for help!
- Be the leader - it is your project
- Balance delegation – not too little, not too much
- Give people a chance to learn - sometimes you have to delegate to people who do it worse than you might

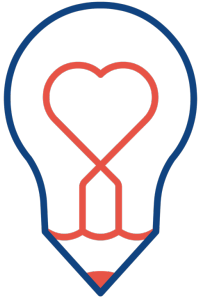


## Tip 6: Plan the routine events and the outputs

- Pre-book routine meetings – helps prioritize them
- Plan roles and responsibilities for the duration of the project - set your expectations
- Plan monitoring - budget, timelines, risks
- Plan the outputs...and post-project issues (data, future contact, next project...)
- ...have the difficult conversations up front
- Sign an agreement with co-investigators



# ICJME criteria



## Recommendations

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Defining the Role of Authors and Contributors

Disclosure of Financial and Non-Financial Relationships and Activities, and Conflicts of Interest

Responsibilities in the Submission and Peer-Review Process

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## Defining the Role of Authors and Contributors

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- [2. Who Is an Author?](#)
- [3. Non-Author Contributors](#)

### 1. Why Authorship Matters

Authorship confers credit and has important academic, social, and financial implications. Authorship also implies responsibility and accountability for published work. The following recommendations are intended to ensure that contributors who have made substantive intellectual contributions to a paper are given credit as authors, but also that contributors credited as authors understand their role in taking responsibility and being accountable for what is published.

Because authorship does not communicate what contributions qualified an individual to be an author, some journals now request and publish information about the contributions of each person named as having participated in a submitted study, at least for original research. Editors are strongly encouraged to develop and implement a contributorship policy. Such policies remove much of the ambiguity surrounding contributions, but leave unresolved the question of the quantity and quality of contribution that qualify an individual for authorship. The ICMJE has thus developed criteria for authorship that can be used by all journals, including those that distinguish authors from other contributors.

### 2. Who Is an Author?

The ICMJE recommends that authorship be based on the following 4 criteria:

- Substantial contributions to the conception or design of the work; or the acquisition, analysis, or interpretation of data for the work; AND
- Drafting the work or revising it critically for important intellectual content; AND
- Final approval of the version to be published; AND
- Agreement to be accountable for all aspects of the work in ensuring that questions related to the accuracy or integrity of any part of the work are appropriately investigated and resolved.

In addition to being accountable for the parts of the work he or she has done, an author should be able to identify which co-authors are responsible for specific other parts of the work. In addition, authors should have confidence in the integrity of the contributions of their co-authors.

All those designated as authors should meet all four criteria for authorship, and all who meet the four criteria should be identified as authors. Those who do not meet all four criteria should be acknowledged—see Section II.A.3 below. These authorship criteria are intended to reserve the status of authorship for those who deserve credit and can take

# Summary

## Tip 1: Project management starts with the proposal

- Bake project management in

## Tip 2: Sort governance at first attempt

- Ethics takes time

## Tip 3: PPI matters

- Achieve meaningful co-production through active engagement

## Tip 4: Use tools to help with project management

- Gantt charts are a necessary evil

## Tip 5: Don't be afraid to manage upwards

- You are the boss!

## Tip 6: Plan the routine

- Agree roles, outputs and meeting schedules

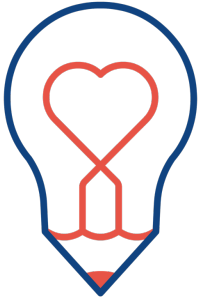
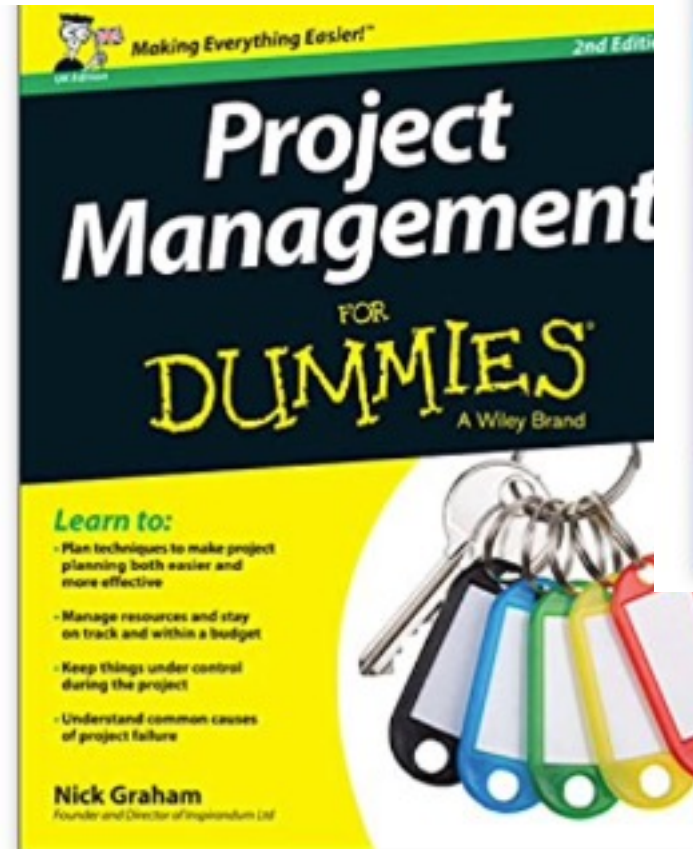


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# Questions?

# Resources





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# Thank you!

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