STAR | STRENGTHENING ADMINISTRATION OF RESEARCH

Workshop Series

- Welcome! Thank you for joining us. The workshop will begin shortly.
- Please check that you are on mute and your video is off.
- This workshop will be **recorded**.
- Workshop resources (slides, recording, etc.) will be distributed after the workshop.

Workshop #8

Project Management for Research Administrators:
What is it and how can it support my role?

Christine Misquitta, Senior Strategist, Research, VPRI
March 6, 2024, 10:00 – 11:30 am

Land Acknowledgement

"I (we) wish to acknowledge this land on which the University of Toronto operates. For thousands of years it has been the traditional land of the Huron-Wendat, the Seneca, and the Mississaugas of the Credit. Today, this meeting place is still the home to many Indigenous people from across Turtle Island and we are grateful to have the opportunity to work on this land."

Access Check

- Access is a shared responsibility between everyone in this workshop.

- If there is anything (presenter screen, sound, general tech issues) that may affect your participation in this session, please use the Zoom chat to send a private chat message to **Luke Wesley**

Questions

- At any time, enter questions into the chat
- Answers provided at dedicated Q&A portion

- Contact us after for situation-specific questions

Meet Your Peers
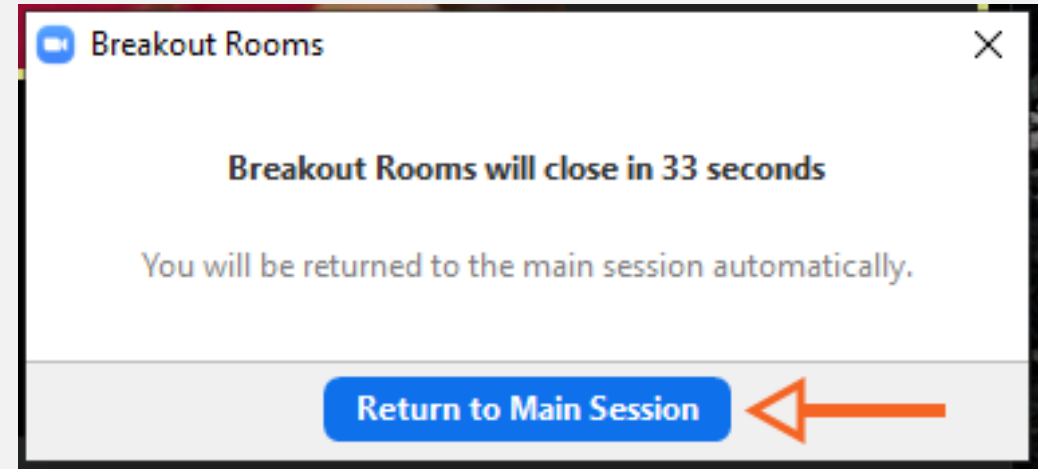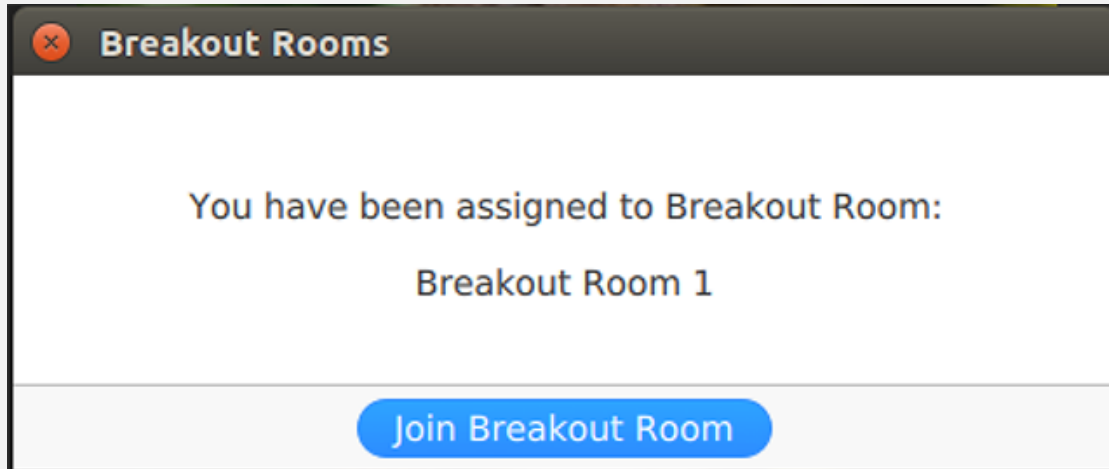
In the breakout room, please unmute yourself and turn on your video.

Meet Your Peers

- Name

- Role

- Department/Faculty

- What are you hoping to learn from this workshop?

5 minutes
(~1 minute/person)

Who are U of T research administrators?

ENTER YOUR ROLE IN THE CHAT

My path at U of T

- Postdoctoral Fellow

- Research Associate

- Project/Program Manager

- Director, Institutional Strategic Initiative

- Senior Strategist, Research

- Instructor, U of T School of Continuing Studies

Check in exercise

AGENDA

What we will cover ✅

1. Project Management Basics
2. Benefits of Project Management
3. Common Challenges & Constraints
4. PM Approaches & Tools
5. Resources for Follow up
6. Questions

What we will NOT have time for ❌

In depth demonstration of tools and templates

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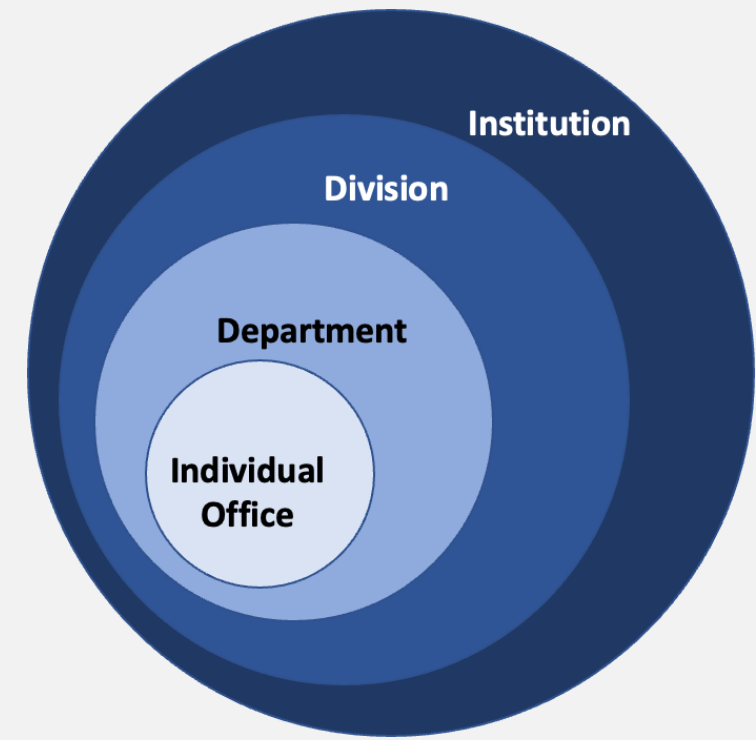
Introduction to Project Management:

What is a project?

"A project is a temporary endeavor undertaken to create a unique product, service, or result." (PMBOK Guide 7th Ed)

- Solve a problem
- Satisfy a need
- Comply with a requirement
- Capitalize on an opportunity
- Align with a strategic priority

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Projects vs. Operations

- Projects are **temporary** with a **unique** outcome

- Operations are **ongoing** and may be **repetitive**

Poll question:

Select **all** that you consider a 'project' (vs. an operation?):

- Reviewing the schedule and signing up for weekly classes (Zumba, HIIT, spin) at your gym

- Setting up a training schedule for a half-marathon in September

- Planning a family vacation for this summer break

- Making a list for your trip to the grocery store

Poll Results

What is a project?

Poll | 1 question | 128 of 143 (89%) participated

1. Which of the tasks below is a project (vs. an operation?) Select all that you consider a 'project'. (Multiple Choice)

128/128 (100%) answered

1. Reviewing the schedule and signing up for weekly cl... (15/128) 12%

2. Setting up a training schedule for a half-marathon i... (95/128) 74%

3. Planning a family vacation for this summer break (124/128) 97%

4. Making a list for your trip to the grocery store (33/128) 26%

Examples in research administration

Projects

- Creating a departmental website

- Submission of a departmental CFI grant

- Planning a research symposium to initiate collaborations

Operations

- Updating the departmental website

- Operating and maintenance of CFI-funded equipment

- Managing a research collaboration or partnership

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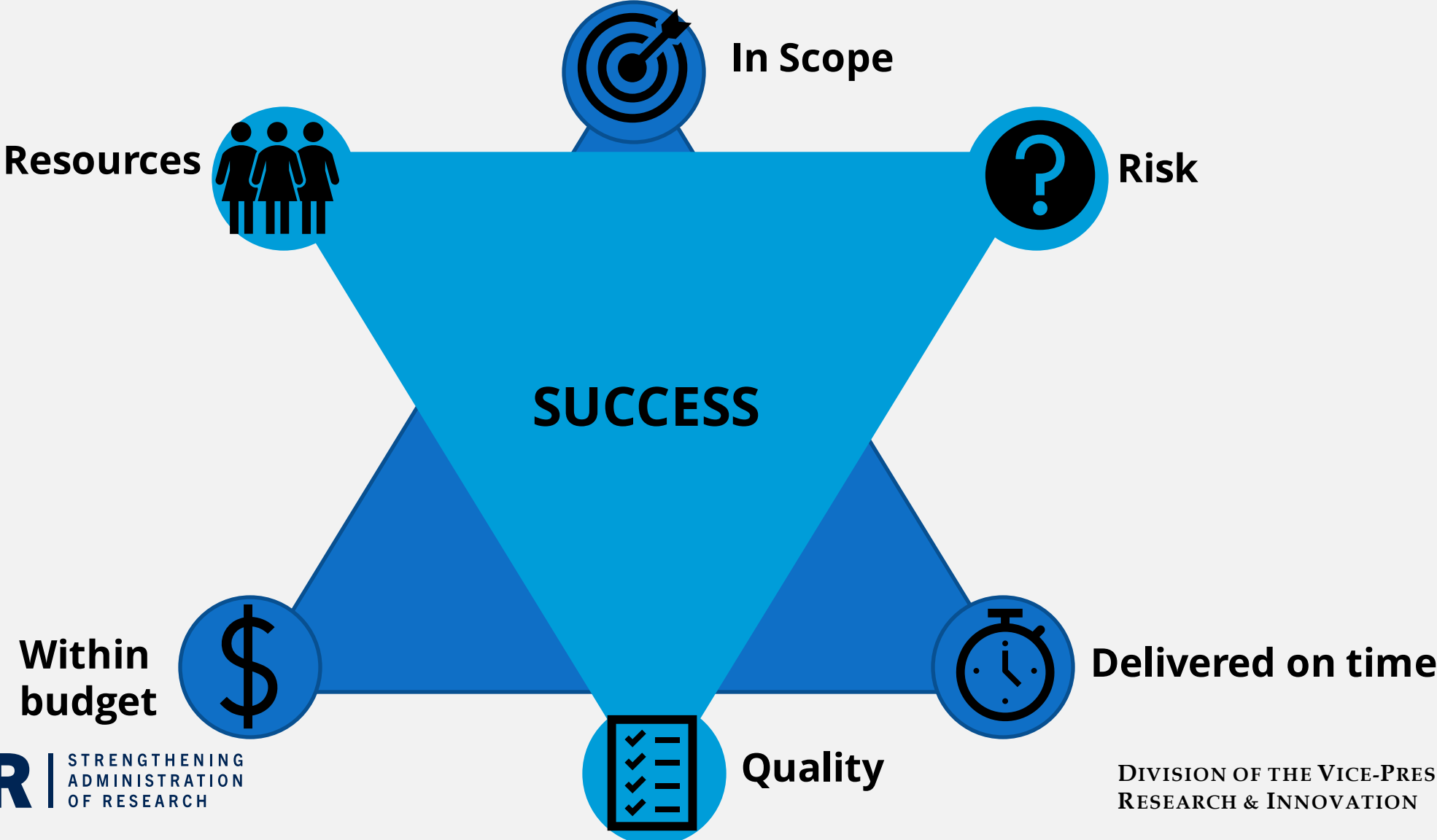
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What makes a project "successful"?

Go to **www.menti.com**

use code **9736 3875** to share your ideas

What makes a project "successful"?

121 responses

Project Constraints

In Scope

Resources

Risk

SUCCESS

Within budget

Delivered on time

Quality

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What is Project Management?

"The application of knowledge, skills, tools and techniques to project activities to meet project requirements"(PMBOK Guide 7th Ed)

Project Management tools can:

- Help with organization
- Provide a framework for tracking progress
- Help reduce risk
- Manage relationships
- Help with project continuity

Project Management organization

3 Domains
People
Processes
Business Environment

5 Process Groups:
Initiating
Planning
Executing
Monitoring &
Controlling
Closing

10 Knowledge Areas:
Integration
Scope
Schedule
Cost
Quality
Resource
Communication
Risk
Procurement
Stakeholder

Project Management Domains

3 Domains
People
Processes
Business Environment

- **People** = understanding the human element of project success

- **Process =** managing all the processes and the technical aspects or tools that drive project management

- **Business Environment** = the specific industry or business need for a given project

Project Management Process Groups

5 Process Groups

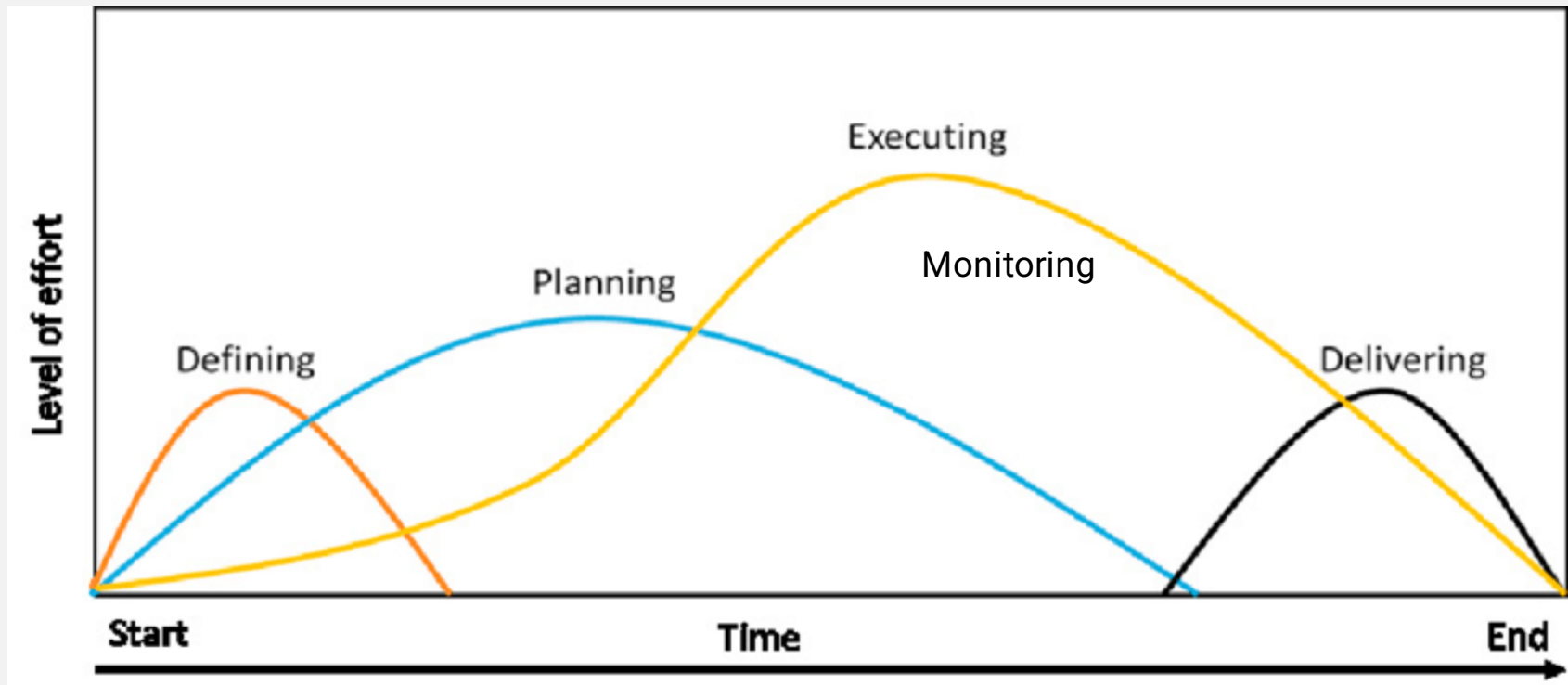Initiating

Planning

Executing

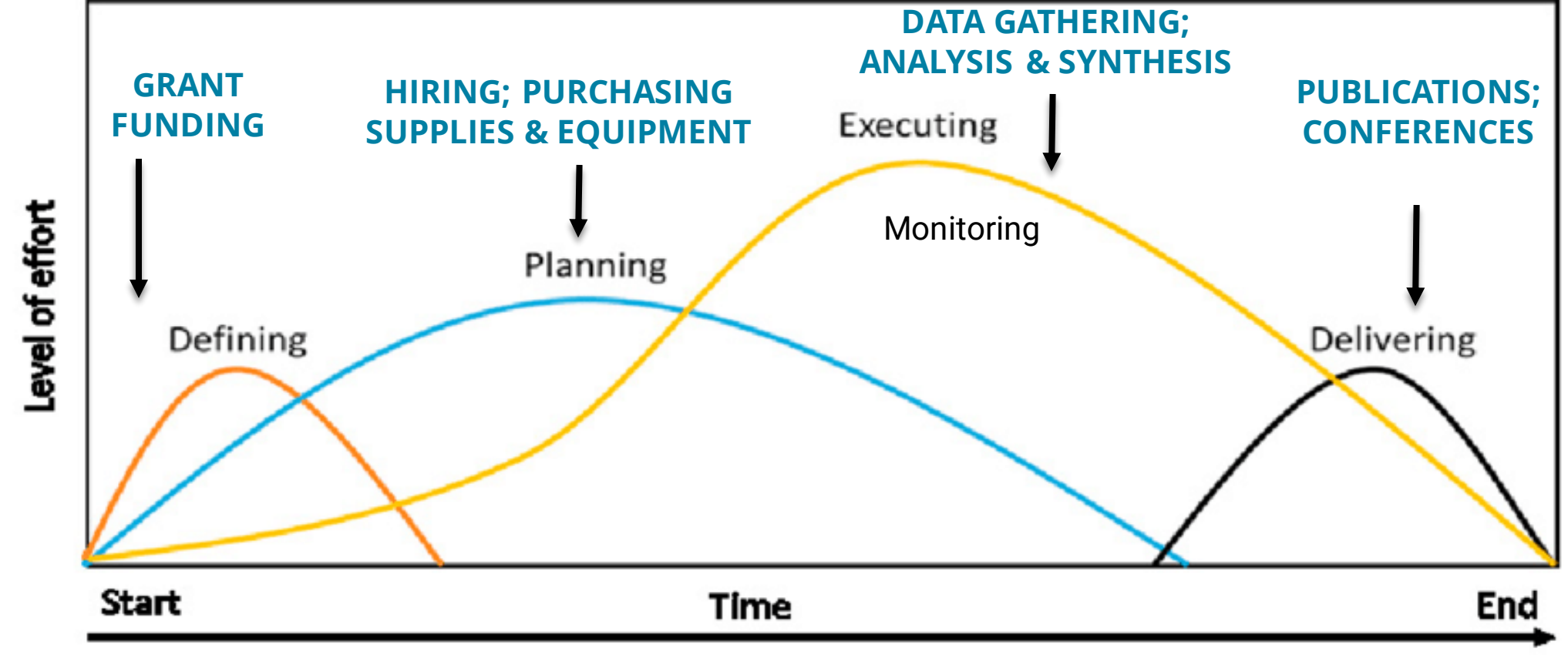Monitoring & Controlling

Closing

- **Initiation** = starting

- **Planning** = creating a strategy

- **Executing** = carrying out the plan

- **Monitoring and Controlling** = oversight

- **Closing** = ending

Project Life Cycle

"The project life cycle is the series of phases a project passes through from start to completion" (PMBOK Guide 1.2.4.1 6th Ed)
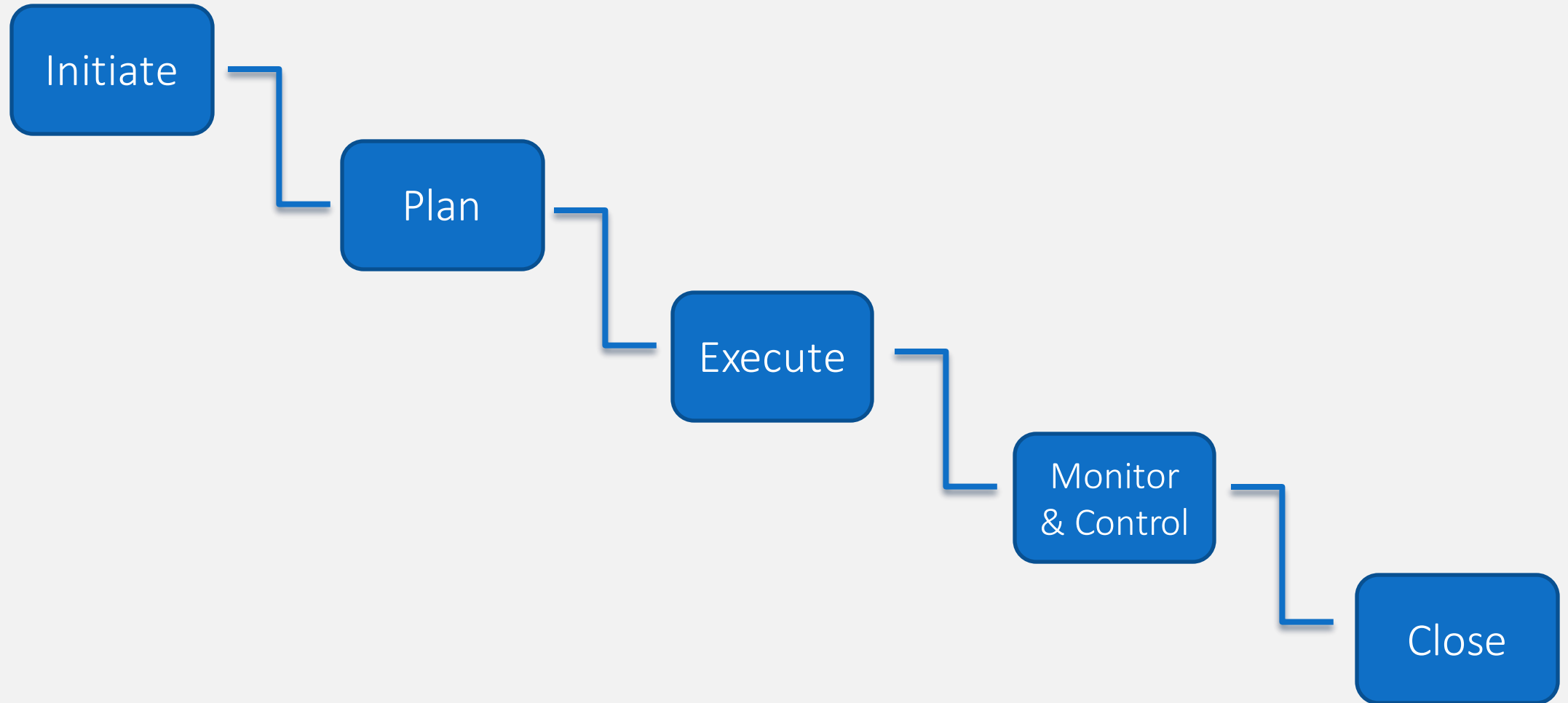
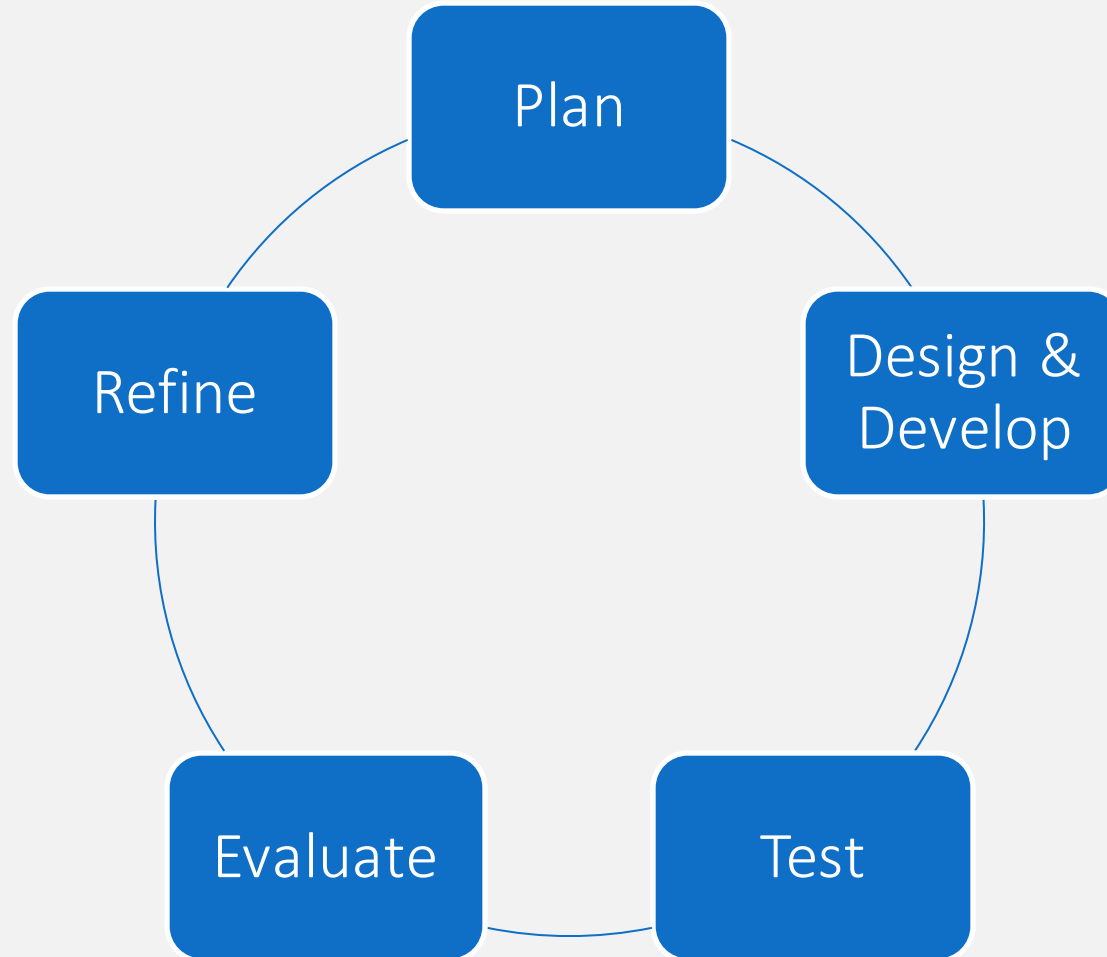# Research Project Life Cycle

Predictive (Waterfall) PM Approach

Initiate

Plan

Execute

Monitor & Control

Close

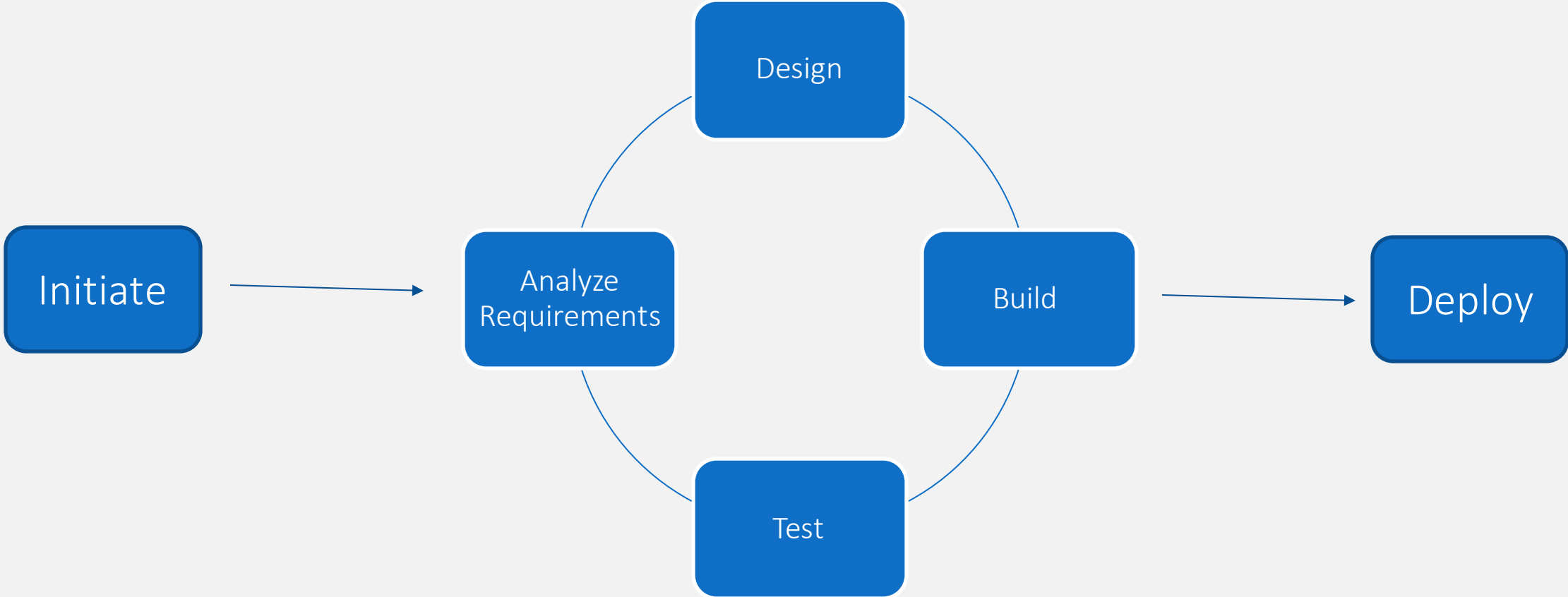# How do research projects differ?

- Often have sub-projects
- Can be uncertain
- Often faced with changing priorities
- May have multiple stakeholders to satisfy

Adaptive (Agile) PM Approach

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Iterative PM Approach

One size does not fit all....TAILORING

AGILE

SCRUM

INCREMENTAL

PREDICTIVE

ITERATIVE

PM APPROACH CAN BE TAILORED

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Project Management Knowledge Areas

10 Knowledge Areas

Integration

Scope

Schedule

Cost

Quality

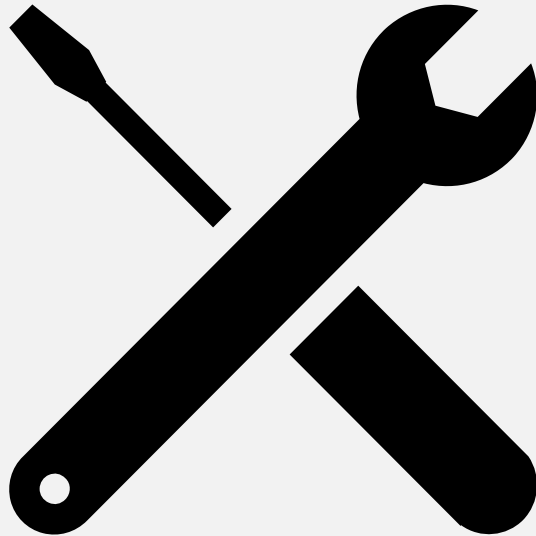Resource

Risk

Communication

Procurement

Stakeholder

- **Integration** = brings together knowledge areas

- **Scope** = what is included (and NOT) in the project

- **Schedule** = timeline

- **Cost** = budget

- **Quality** = good result or minimum level needed

- **Resource** = equipment AND people needed

- **Risk** = issues and opportunities

- **Communications** = with all stakeholders

- **Procurement** = acquisition of resources

- **Stakeholder** = those impacted by the project

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What tools have you used?

Go to **www.menti.com**
use code **9736 3875** to share your ideas

Mentimeter Results

- Timelines
- Excel
- Budget Template
- Variance Analysis template
- 'Traffic lights'
- Teams Group chat
- Kanban board
- PM software
- Scope
- Schedule

- Airtable
- Stakeholder consultation/iterative process
- Gantt charts
- OneNote
- Outlook Inbox management
- Regular check-ins/huddles
- Outlook calendar
- Project charter templates

Mentimeter Results (continued)

- Waterfall, Agile, Scrum
- Checklists
- Team-building activities
- Asana
- Internal resources and personnel from other divisions/departments
- Peers
- Milestone tracking

- Microsoft tasks
- Slack
- Zoom
- Monday.com
- MS Project
- Notion
- Stand-ups
- Workplans
- Trello
- Discord

Mentimeter Results (continued)

- Spreadsheets with timelines & milestones
- DevOps
- Jira
- ExcelProgress
- Snacks
- Shared files

Project Management Tools

- **GANTT Charts** – for **integrating scope**, **schedule**, and **budget**
- **Work Breakdown Structure** – for managing **scope**
- **Critical Path analysis** – for managing **schedule**
- **Budgets** - for managing project **costs**
- **Control Charts** – for monitoring **quality**
- **Risk Register** – for identifying & mitigating **risks**
- **RACI** – for defining project roles and team **communications**

Project Management Tools

- List/Check sheet
- Teams & SharePoint
- Calendars/Shared Calendars
- Email Contact groups
- Polls/Surveys
- Workplans
- Pros/Cons list
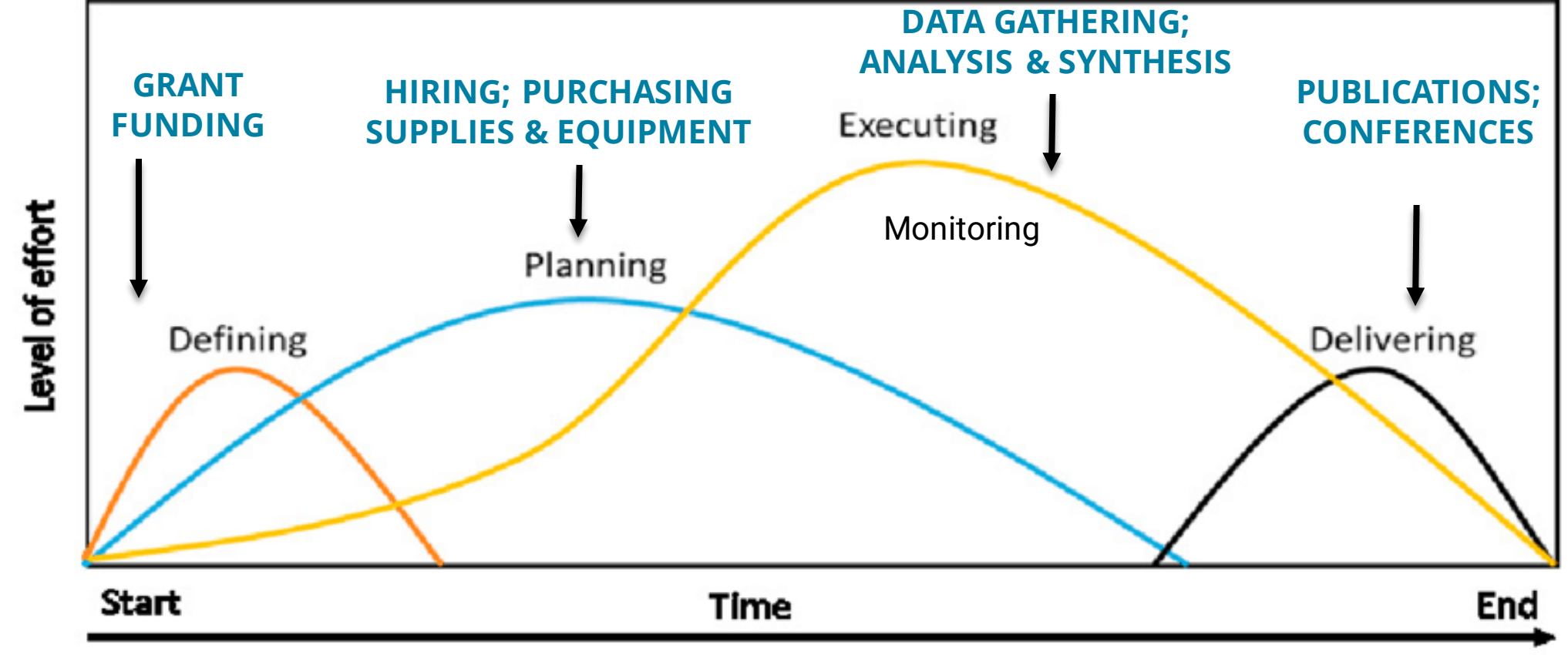- Brainstorming
- Flow Charts
- Benchmarking

Institutional Tools & Templates

- SOPs
- Contracts, MOUs, Agreements
- Procurement Guidelines
- HR Guidelines
- UTRAC

Sponsor Tools & Templates

- Funding Agreements
- Reporting Templates
- Publication guidelines

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Research Project Life Cycle

Research Project - Administration

Project Life Cycle

Defining

Planning

Executing & Monitoring

Delivering

Faculty

PROPOSAL FUNDING

HIRING; PURCHASING SUPPLIES

EXPERIMENTS; DATA GATHERING; ANALYSIS

PUBLICATIONS

Financial Administrator

Pre-submission budget review

Research fund set up

Procurement; monitor expenditures; eligible expenses
Financial reports; monthly payroll; Spending updates to PI

Final reports

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Business Officer – Grant Support

Project Life Cycle

Initiating

Proposed budget review

Planning

Research fund set up

Executing & Monitoring

Procurement; monitor eligible expenses; monthly payroll; spending updates

Closing

Final reports

Knowledge Areas

Integration

Scope

Schedule

Cost

Quality

Resource

Communication

Risk

Procurement

Stakeholder

Tools & Templates

GANTT chart

Budget Template

UofT HR Guidelines

UofT Procurement Guidelines

Sponsor-specific reporting template

Purchase Orders

Research Officer – Workshop or Session

Project Life Cycle

Initiating

Identify topic

Planning

Date, time, venue, Speakers, registration

Executing & Monitoring

Workshop delivery

Closing

Q&A, follow up

Knowledge Areas

Integration

Scope

Schedule

Cost

Quality

Resource

Communication

Risk

Procurement

Stakeholder

Tools & Templates

Checklists

Communication Plan

Registration tracker

Risk Register & Mitigation Plan

Post-event survey

Coordinator – Research Facility Setup

Project Life Cycle

Initiating

Planning

Executing & Monitoring

Closing

Scope of Facility; funding

Software for booking, billing; Technical expertise

Procurement of equipment; installation; Hiring & Training; Advertising

Launch or opening

Knowledge Areas

Integration

Scope

Schedule

Cost

Quality

Resource

Communication

Risk

Procurement

Stakeholder

Tools & Templates

Business case

Budget Template

UofT HR Guidelines

UofT Procurement Guidelines

Approval Workflow

Incident Report template

Training Manual

Maintenance Schedule

One size does not fit all....TAILORING

Approach

Tools

Context

- Scope or size of the project
- Sponsor or competition
- Division
- Faculty

U of T Project Management Resources:

Project Management Institute (PMI)

Available to members:

Project Management Book of Knowledge (PMBOK)

PMI webinars

Ways of Working	Power Skills	Business Acumen
• Agile • Hybrid • Design Thinking • Governance • Data Gathering and Modeling • Performance Management • Earned Value Management • Risk Management • Time, Budget, and Cost Estimation • Requirements Management & Traceability	• Leadership • Active Listening • Communication • Adaptability • Brainstorming • Coaching and Mentoring • Conflict Management • Emotional Intelligence • Influencing • Interpersonal Skills • Negotiation • Problem Solving • Teamwork	• Benefits Management • Business Models and Structures • Competitive Analysis • Customer Relationships Industry Domain Knowledge • Legal and Regulatory Compliance • Market Awareness • Strategic Planning

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U of T Resources - VPRI

Available:

STAR Program

Upcoming: https://research.utoronto.ca/training-resources/research-administration-training-star-program

Recordings: https://research.utoronto.ca/training-resources/research-administration-training-star-program/previous-star-workshop

VPRI website – https://research.utoronto.ca/#forms

U of T Resources – CRIS

Available:

Upcoming: https://cris.eve.utoronto.ca/home/events
Recordings: https://cris.utoronto.ca/videos/

Project Management for Research – Alison Paprica *(Recording from Jan 19, 2024 session)*
Project Management – Research Readiness Experiential Learning *(Resource Hub)*

U of T Resources - LLC

- Project Management Foundations (LinkedIn Learning)
  - Lessons Learned, Schedules, Ethics, Communications, Requirements
- Change Management Foundations (LinkedIn Learning – 1021)
- Project Resource Management (LinkedIn Learning)
- Conflict Management (LLC- ELV-001)
- Time Management Fundamentals (LinkedIn Learning – 1080)
- Basic Funds Management Reporting (FIS -1008)
- Events Management (ARB-1002a)

U of T Resources - SCS

1860 Foundations of Project Management

- Fundamental PM skills and tools for practical use in any sector
- Course credit with SCS at U of T
- This course will contribute to many different SCS Certificates
- This course fulfills the educational requirement for PMI Project Management Professional (PMP) or Certified Associate in Project Management (CAPM) Certification
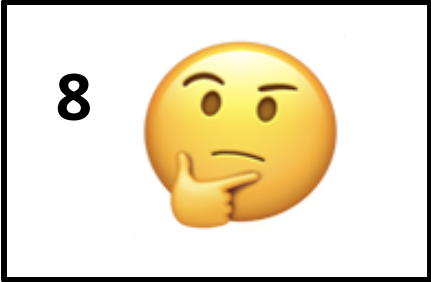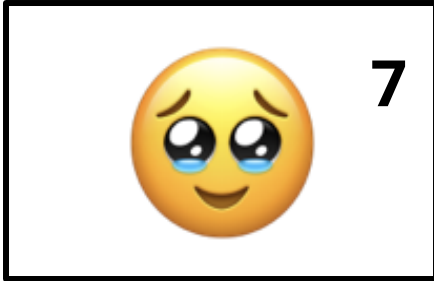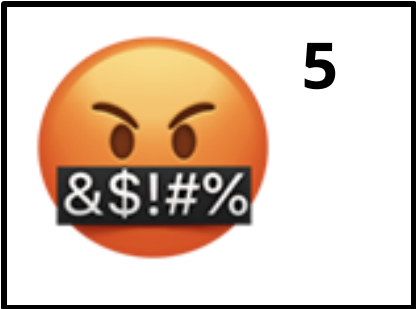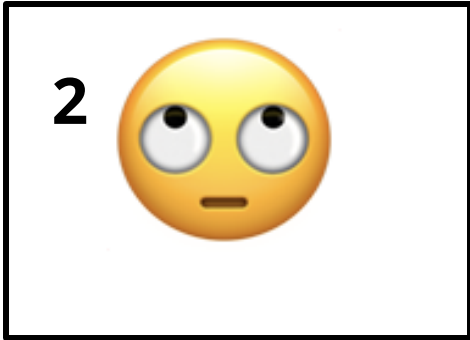
As a staff member at the University of Toronto, you can take four (4) work related courses up to a value of $750 at the School of Continuing Studies at no cost to you (100% of tuition fees are waived).

Key Takeaways

- Understanding of basic PM concepts:
    - Projects versus Operations
    - Stages in a Project Life Cycle
    - Different PM Approaches
    - PM Knowledge Areas & Tools
    - Tailoring

- Resources for further learning

Closing exercise

Question & Answer