Research 102: Planning for success

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EMF Research Development Manager
1. TIME FRAMES
   - Pre-award preparation and planning
   - Post-award project planning

2. RESOURCE REQUIREMENTS
   - Personnel
   - Direct research costs
   - Equipment costs

3. MILESTONES
   - Internal
   - External

4. CHECKS & BALANCES
   - Progress
   - Communication

5. AVOIDING FAILURE
1. Timeframes – pre-award preparation

What to do while you wait for the outcome…

<table>
<thead>
<tr>
<th>ETHICS &amp; GOVERNANCE</th>
<th>HUMAN RESOURCES</th>
<th>RESEARCH PROTOCOL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meet with RGO re organisational process</td>
<td>If personnel requested check recruitment process</td>
<td>Identify a journal to submit research protocol for publication</td>
</tr>
<tr>
<td>Send out project documents for feedback</td>
<td>Create position description &amp; job advertisement</td>
<td>Ask colleagues to review/feedback on protocol and timeline</td>
</tr>
</tbody>
</table>
1. Timeframes – post award project plan

**ETHICS & GOVERNANCE**
- National Ethics Application (NEAF)
- Low or Negligible risk (LNR)
- Site Specific Assessment (SSA)
- Public Health Act (PHA)

**CONTRACTUAL AGREEMENTS**
- Funding body
- Administering Institute/University/HHS

**HUMAN RESOURCES**
- Advertise position
- Interview
- Staff contract(s)

**TRAINING & EDUCATION**
- Departmental project familiarisation
- Project staff training needs (e.g. GCP)
1. Timeframes – post award project plan

<table>
<thead>
<tr>
<th>DATA</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Data collection</td>
<td>Data entry</td>
<td>Data analysis</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>IMPLICATIONS</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Review and quality check data</td>
<td>Understand/discuss outcomes</td>
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<table>
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<tr>
<th>DISSEMINATION</th>
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</thead>
<tbody>
<tr>
<td>Conference oral/poster presentation</td>
<td>Manuscript preparation/submission</td>
<td>Media – local HHS, QH, twitter, LinkedIn</td>
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</table>
1. Timeframes – post award project plan

Even the most simple project should have a formal, comprehensive plan. Consider using:

- Microsoft Project (license fee for QH, but check your Uni affiliation)
1. Timeframes – post award project plan

![Gantt Chart with Project Summary and Task Details]

- **Task Name**: Project Summary
  - **Cost**: $38,000.00
- **Task Name**: Design Phase
  - **Cost**: $18,400.00
- **Task Name**: First Design Phase
  - **Cost**: $4,000.00
- **Task Name**: Start Milestone
  - **Cost**: $0.00
- **Task Name**: Design Task 1
  - **Cost**: $4,000.00
- **Task Name**: Second Design Phase
  - **Cost**: $14,400.00
- **Task Name**: Design Task 2
  - **Cost**: $6,000.00
- **Task Name**: Design Task 3
  - **Cost**: $4,000.00
- **Task Name**: Design Task 4
  - **Cost**: $4,400.00
- **Task Name**: End Design Milestone
  - **Cost**: $0.00
- **Task Name**: Programming Phase
  - **Cost**: $10,000.00
- **Task Name**: Program Task 1
  - **Cost**: $6,000.00
- **Task Name**: Program Task 2
  - **Cost**: $4,000.00
- **Task Name**: End Program Milestone
  - **Cost**: $0.00
- **Task Name**: Testing Phase
  - **Cost**: $9,600.00
- **Task Name**: Test Task 1
  - **Cost**: $2,400.00

The Gantt Chart provides a visual representation of the project timeline and task dependencies.
1. Timeframes – post award project plan

Even the most simple project should have a formal, comprehensive plan. Consider using:

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- Microsoft Excel template
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- Microsoft Project (license fee for QH, but check your Uni affiliation)
- Microsoft Excel template
- Dropbox (also essential for sharing team documents!) – now has a project overview template: https://paper.dropbox.com/welcome
1. Timeframes – post award project plan
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Even the most simple project should have a formal, comprehensive plan. Consider using:

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- Microsoft Excel template
- Dropbox (also essential for sharing team documents!) – now has a project overview template: https://paper.dropbox.com/welcome
- Other software available at low cost e.g. www.openproject.org; https://basecamp.com/

**BUT** not able to link plan to data storage or document management…
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   • Post-award project planning

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Research 102
2. Resources

➢ **Personnel**
   - Ongoing project staff e.g. research nurse
   - Consultant required at multiple stages e.g. health economist
   - One-off statistical support e.g. final data analysis

➢ **Direct research costs**
   - Travel, conferences, training, publications
   - Biobanks, pathology, radiology etc.
   - Stationery, printing, software (The HHS should not have to pay!)

➢ **Equipment costs**
   - Medical equipment required for research project
   - Laptop/tablet computers for participant recruitment, education, testing
BUDGET APPROPRIATELY OR YOU MAY NOT FINISH YOUR PROJECT!

GET ADVICE from experienced researchers
INCLUDE CONTINGENCY for possible cost increases
INCLUDE COLLABORATOR COSTS for good working relations
2. Resources – data management

ANDS – Australian National Data Service  [www.ands.org.au]
2. Resources – data management

ANDS have also created a self-paced learning program:

“10 medical and health research data Things”

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3. Milestones

- Milestones are the achievement of SPECIFIC ACTIVITIES critical for project completion.
- Milestones allow you to OBSERVE, MEASURE & MONITOR progress and performance

**INTERNALLY DRIVEN MILESTONES**
- Ethics or SSA approval
- Completion of staff training
- Publication of research protocol
- Completion of data collection
- Publication of outcomes

**EXTERNALLY DRIVEN MILESTONES**
- Abstract submission deadline
- Conference dates
- HREC reporting
- Funding body progress reporting
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Research 102
4. Checks & Balances

- *Hold regular progress meetings (monthly at least)*
- *Monitor progress against your plan/milestones*
- *Identify your stakeholders (+ve and -ve!)*
- *Monitor and communicate milestones (big and small, +ve or -ve)*
- *Communicate difficulties with stakeholders as soon as they arise*
- *Consider setting up a steering committee*
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Research 102
5. Avoiding failure

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<thead>
<tr>
<th>PLANNING</th>
<th>TIPPING POINTS</th>
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<tbody>
<tr>
<td>Keep scope feasible - KISS</td>
<td>Recruitment difficulties</td>
</tr>
<tr>
<td>Identify and engage stakeholders</td>
<td>Slow or cumbersome processes</td>
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<tr>
<td>Comprehensive financial planning</td>
<td>Lack of supervision for data collection</td>
</tr>
<tr>
<td>Find a popular site champion</td>
<td>Poor financial management</td>
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<tr>
<td>Engage all ED staff</td>
<td>Not completing data collection</td>
</tr>
<tr>
<td>Deliver training and education</td>
<td>Too much data, not usable, not clean</td>
</tr>
<tr>
<td>Standardise processes for recruitment</td>
<td>Key stakeholders missing</td>
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<tr>
<td>Resource appropriately</td>
<td>Passive management</td>
</tr>
<tr>
<td>Be proactive with ethics/governance</td>
<td>Gaps in knowledge</td>
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5. Avoiding failure – identify support

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<tbody>
<tr>
<td>EMF Research Support Network</td>
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<tr>
<td>Statistician / Health Economist</td>
</tr>
<tr>
<td>Research Governance Office</td>
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<tr>
<td>Library Services (QH &amp; University)</td>
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<tr>
<td>University affiliation / academic title</td>
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<tr>
<td>PHN (Public Health Network)</td>
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<tr>
<td>Queensland Ambulance Service</td>
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<tr>
<td>Experienced mentor (check reputation!)</td>
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Q & A