Episode 4: Solo Episode

# KL: Katie LinderKL: You’re listening to *Research in Action*: episode four.

# [intro music]

# Segment 1:

# KL: Welcome to *Research in Action*, a weekly podcast where you can hear about topics and issues related to research in higher education from experts across a range of disciplines. I’m your host, Dr. Katie Linder, director of research at Oregon State University Ecampus.

On today’s episode, I’m flying solo and I’m going to share some of the organizational strategies for juggling multiple research projects that I have developed over my time as a researcher. I would also love to hear from listeners whether you use these strategies or if there are other helpful tips you have for moving multiple projects forward simultaneously.

I’ve now been in a couple of administrative positions where I’ve had lots of research projects that I have had to juggle and make sure that they were moving along my research publication pipeline in an efficient and manageable kind of way, I’m sure you can relate if you’re writing articles and books, if you’re presenting conference presentations, preparing IRB applications for future research and generally just doing the work of healthy research and writing portfolio. So I’ve been thinking about this in particular as I get the research pipeline started for the Ecampus research unit here at Oregon State.

As I record this I’ve been in the job for little over 6 months and we have lots of projects going on, our pipeline is very full and the research unit is also relatively minimally staffed, I’m the only full-time person who works in the research unit. I have a couple of awesome graduate students who work for me part time and that I’m also currently hiring a part time administrative program assistant after my previous program assistant retired. So we have pretty minimal staff and I’m kind of juggling a lot of things on my own so today I wanted to talk about 3 different categories of strategies to help you juggle multiple projects.

I hope you’ll weigh in with your own experiences in the episodes comments or join me on twitter. You can find us on twitter @RIA\_Podcast or use the #RIA\_Podcast to label any comments you have in response to the episode.

So the three things I want to talk about today is strategies for getting things out of your head, strategies for sharing the load or being accountable to other people, and then also strategies for keeping multiple projects organized and at your fingertips.

So in the first category one of the things I’ve found to be super helpful for me when I’m juggling multiple projects is getting everything out of my head so I can get productive and creative and to kind of think and process information so that I can complete those projects in a of successful way.

So there are several ways that I have worked with this, one is in both of the main offices that I’ve had when I worked at my previous job in faculty development and now that I’m here at the research unit is I had huge whiteboards that I put into my office. This is one way I’ve had of getting up information kind of out in front of me where I can see it regularly. I can use those whiteboards to create a comprehensive list of next steps or action items. I circle, draw a line through, X-out the things that either need to happen next or that I’ve accomplished so I kind of know when to move onto the next things and often when I use whiteboards in this way I also will take a picture of the whiteboard once I have it full so I can erase it if I need to erase it, or I’ll have that picture to take with me and refer to when I’m not in my office, if I’m using that whiteboard in a kind of a comprehensive way of trying to write down all of my upcoming to-do’s.

The other added bonus I think for using whiteboards this way is anyone who comes to visit you or works with you has a really good sense of all the things on your plate. So when I have the whiteboards I often get comments from people asking about the projects I got listed or just comment how busy I am. This isn’t necessarily a bad thing; it helps people know that your time is really precious because you’re working on all these projects.

The second strategy that I use for getting out of my head and this is particularly when I feel like I have so many projects that are really backed up is I conduct an audit and this is something I recommended also to faculty that I work with that are really trying to prioritize what to move onto next when It comes to their research and when I conduct an audit I write down every project that is either professional or sometimes personal If there are some big things going on. Then I include the deadlines, the collaborators, the project outcomes or the outlets that I want for those particular items. So oftentimes this is a form of kind of grid—and I’m happy to share a template of this in the show notes—where I can kind of look at a glance and also track things like what’s funded or what’s peer reviewed and that often helps me to kind of think about is my pipeline moving in the directions that I want it to, is it robust enough, am I getting the right amount of collaboration or fundable projects included in that pipeline and it allows me maybe most importantly to look for patterns and also research priorities and to really have a sense of am I covering all the priorities that we’ve outlined for the mission of the unit, is there any gaps, are there things missing in terms of the research projects that we’ve created? So conducting an audit is a huge thing that I do relatively frequently, maybe quarterly or at least a couple times a year just to get things down so I know what’s on my plate.

The third strategy I recommend for getting things out of your head is calendaring, and this is something that when things get very busy I completely live by my calendar and I’ll plan things out in advance so I’m not having to worry about keeping them In my head thinking about them. So I do use Outlook, and I use it to schedule things like email drafting if I have an email to send but it’s going to take some time to write it out I will schedule 15 minutes into my calendar just so I can give it some thought. If I have meetings they go in my calendar, certain action items I will sometimes put into my calendar or deadlines that are upcoming. I absolutely schedule in writing time or just kind of project based segments of my calendar so I know I have dedicated time to think about or dedicate to that project.

Then also I definitely also schedule in thinking and processing time which I think is something that is the people that I know that have really good work life balance always schedule the sense so I’ve tried to emulate that and sometimes that’s at the beginning of the day or the end of the day or the end of the week. But I always try to schedule in some of that to and that’s what also allows me to think about future visiting for the research unit or for my own kind of publication, what are the things I want to be working towards? And it kind of just gives you that time to think and plan and brainstorm which is always really helpful.

A couple of strategies that I’ve found work really well with calendaring is that I always block out time right up to the deadline of a project, even if I think that I’ll be able to get it done earlier, I make sure to have chunks of time right up to the deadline of a project. Even if I think I’ll be able to get it done earlier, I make sure and have chunks of time right up to that deadline. On the off chance that it takes that entire kind of timeline it’s harder for me to carve out time when it’s already taken up by other meetings. So if I can kind of think ahead and say “hey these are the hours I want to work on this uninterrupted and not let anything schedule over them” it’s easier to take those things off my calendar then to add them in when I need them later.

I’ve found that if I don’t schedule it, it often doesn’t get done. That’s especially when I’m very, very busy and I’ve got lots of to-do lists. I will put certain types of action items or to-do items directly into my calendar. Oftentimes that’s connected to things like sending emails but sometimes it’s also you know just turning in a piece of paper to HR. I would schedule in a 15 minute quick walk over to that building to drop it off. I’ve also found that if it keeps getting pushed back on my calendar due to other priorities it means I really need to think about that thing and do I really need to keep it into my to-do list or maybe it’s a thing that I don’t enjoy and then I really push myself to get it done and get it crossed off my list.

I have had some success with color coding on my calendar just to help me see some priorities or patterns or trends of different work that I’m doing at a glance. This has been especially helpful for me at times when I’m teaching and I need to see when my teaching times are going to be or when office hours are going to be held. It’s also been very helpful to me when I have travel engagements or other things like that which are going to keep me away from the office and I really need to get a sense of when those things are going to come.

The last thing that I would say about calendaring is that really intense calendaring can help you track how long certain projects take. So sometimes if I have a spot on my calendar that is empty, but I use that time to work on a particular project I’ll actually put that time into my calendar after the fact just so that I have a record that I spend that hour and a half working on the IRB application for this upcoming research project that I’m working on and then I can always go back and say “Okay how much time did It really take me to get something up and running” and that is always really helpful as well to think about as you’re planning for the future and planning to build your research pipeline. What are the ways that you can be kind of using your calendar to track that time and help you forecast out for the future. I’m going to take a quick break, when I get back I’m going to talk about strategies for sharing the load or being accountable to your research pipeline.

# Segment 2:

**KL:** On this episode I’m talking about how you can juggle multiple research projects at one time and keep everything simultaneously moving forward and in this segment I’m going to talk about strategies for sharing the load or being accountable when you’re thinking about moving these research projects forward.

So one area that is obviously something that could be helpful is if you have research projects that are collaborative, while some research projects that are collaborative will require extra time and nurturing because of the relationship building that’s happening there. It’s also I think something that can work to help you move multiple things forward at the same time particularly if you can be scheduling meetings out with your collaborators whether that be in person or by phone or skype. So you always have something that you’re kind of working toward with that particular project and it can also mean that you schedule action items for a particular project that the deadline is your next engagement with that collaborator. So you’re working on completing those to-do items and that means it gets scheduled into your calendar in a very discrete way because you have that upcoming deadline of working with that person. So collaboration has been something that has been really helpful for me, not only for making my work load manageable, but also in being held accountable to a timeline that I set with my collaborators.

A second strategy that I would think about in this area of sharing the load or being accountable is delegation, and this is something that I can do to some degree right now given my staffing circumstances. In the past I’ve had additional staff in other positions where I was really able to think about this more carefully. I do think that one of the most important things to remember about delegation is that good delegation does take time. You do have to set aside time in your schedule to think about what are the projects that really could be delegated, what are the aspects of the projects that could be delegated?

I found this to be true especially when I was working with faculty as a writing coach and they would say you know I have this research assistant and I really don’t know how to use them. Like I don’t know the kinds of tasks they can do for me and they were really kind of realizing that it does take some intentionality of planning out what it is that you want them to do and along with that it takes time to really think about how you want to explain that delegated task to the person that you’re delegating it to, to make sure that its done correctly. This is something I believe in very strongly because if something is done quickly, but it’s completed incorrectly, it’s a waste of everybody’s time. So making sure that when you are delegating research tasks, you’re explaining exactly how it is you want those tasks to be completed and I’ve found in particular, especially for tasks that are a little more monotonous, things that we would give to like a graduate research assistant just because the time consuming aspect of the task.

Providing a rational for why you want it done the way you want it done can be really important because if you have someone who is a junior researcher or an undergraduate researcher they might not realize kind of the detail oriented-ness of what you want them to do when I comes to checking citations or building an annotated literature review list or helping you to kind of build out your Zotero reference database or something along those lines. So I think that providing those sort of rationales along with the tasks is really important. So setting aside time to look at your list of tasks, deciding what could be delegated, and how are the different ways that you want to describe it is really important.

Then the last thing that I would mention around delegation is that when you cannot delegate professional tasks and you don’t have someone, you don’t have a research assistant or someone that can work with you, you want to kind of think about maybe delegating personal tasks to free up your time and I think if you can delegate other tasks like house cleaning or child care or meal prep or you know dropping kids off to daycare or other things that might take up time in your day. Particular during a research crunch time this can be something that is really helpful and also alerts the people around you that you’re in kind of a time where you need to be focusing on a particular project. I’ve found that when I’m under a kind of concrete deadline for something major like I’m finishing up a book manuscript or I’m going for a really large grant. Kind of alerting people around me that’s happening is something that can easily be forgotten. Especially when you think about people in your personal life that may not just be aware of what’s going on for you professionally. So I often will take some time to let people know and to say I may need some additional help.

And actually one more thing that I would add about delegating is that if you have the resources and particularly through grant funds consider hiring a consultant or someone else that could help you do some of the work of your research and this is something that I first started doing when I had to do evaluation and assessment work with some of the grants that I completed and actually ended up hiring a really helpful evaluation consultant that helped me to design the work of the evaluation and the assessment and then also to help complete things like final reports which ended up being very helpful and really took that time consuming task off my plate and sometimes it’s hard to do that, to hire consultants or think about delegation in that way because these are things that you know that you can do but it doesn’t mean that you can’t have someone else do them for you so that you focus on other areas, so I think that is something else to consider when it comes to delegation is are there areas where you might want to bring someone else in to just give you additional time to spend elsewhere.

A third area that I would talk about in terms of sharing the loads and being accountable when you’re juggling many projects is considering some kind of project management software. Some of the ones that I’m familiar with is something like basecamp. Where you can have multiple people contributing to one space, there can be discussion boards, there can be shared documents that are posted, tasks that are set up and assigned to different people, there’s a ton of functionality within these packages. Google teamwork is another example of something that is similar to Basecamp. Many times this may be a separate package that you have to pay to use but depending on the type of work that you’re trying to do, project management software can be helpful just to kind of keep things on track. You can probably certainly do different kinds of things with other software that you might be able to find of free, it may not have exactly the functionality but something like Zohonotes. Where you can share to-do lists and share different notes with people who have an account and then something like Kanbanflow where you have kind of multiple to-do lists and you’re tracking kind of how projects are moving forward, you can color code things.

All of these kind of different online tools can be really helpful to think about making sure that things are staying on track and you’re not missing any kind of deadline and also thing there is certainly the option of combining a lot of different kinds of tools that any of these one tools might do. So if you wanted to use your calendar with conjunction with google drive, in conjunction with the drop box system in the cloud where you’re sharing documents with collaborators or with a team. There are certainly ways to kind of use these technologies to be thinking about ways to manage your projects and kind of keep everything organized and transparent and good communication, particularly when you have projects with other people. When I come back I’m going to talk about some strategies for keeping projects organized and at your fingertips.

# Segment 3:

So one of the biggest challenges when you’re juggling multiple kinds of projects and you’re trying to keep everything moving forward is that you’re afraid that something could get lost and you don’t want to lose track of anything or let anything get derailed. If you’re not working on projects with other people that can be a challenge, and that kind of goes back to what I talked about in segment one which was getting it out of your head and out somewhere like a whiteboard or some kind of audit system where you kind of know everything that’s on your plate, but when you work with multiple projects I do think that there are organizational strategies that can help keep things at the forefront so you’re not losing any projects or having them fall off the map.

So one way to think about this I think I certainly digital organization and many of the projects that we work on when It comes to research involve digital files, data files, drafts of different documents, things like IRB documentation that we’re all trying to keep in the right spot and something that’s helped me when I think about this digital organization is to think about the use of folders in a very particular way. For example in my email box I have a very detailed foldering system that helps me to track, I actually keep research projects separate from my grant writing projects, especially at the application stage so that I can keep all the documentation as I’m working on grant applications in one place and then if that grant is awarded and we conduct research for it, that goes into a separate folder. But I also used my email folders to really think about where it is going to be the most likely place for me to look if I’m thinking about where is it going to be the most likely place for me to look if I’m thinking about oh I need to find this IRB document that I know was emailed to me so I’m always careful to know my own system and once you’ve developed this system and familiarized yourself with it you’re going to be more comfortable about finding these documents.

In terms of my desktop folders I think about what is going to be again the easiest place for me to find the things that I need. So I’ve seen some people use with success like a current projects folder and they kind of cycle things through there pipeline that might be current projects and then a separate folder might be projects that you’re waiting to hear back on, maybe things that are out for review and then you have a separate folder that’s things that are done. You know they’re out there, they’re published, and they’re finished. I also often create project folders that are really based on the project itself. So I might create a folder around a particular research project and then within that folder I would have separate folders for things like IRB documentation, proposal drafts if it was research that was funded and I was drafting grant proposals or proposals to a vendor that I wanted to fund that research and then once the research is underway there might be files for things like data or analysis or drafts of the outcomes of that research in terms of drafting journal articles or reports for those kinds of things. That is something that I’ve found really helpful.

The other piece that’s been really needed when I do systems like that is to have a versioning system that makes sense to me. So when I create new drafts oftentimes when I’m drafting a document I will go through usually more than a dozen drafts of that document just using the save as feature as I make significant changes to it I create a new draft. Some people do that by date, oftentimes I will just label the draft as a draft number and then increase that number as the draft changes and then just make sure to change that file name when it gets submitted so someone doesn’t see that this is draft 33 of your application document, they see it as the final draft. But having that versioning system makes it really easy for me to find things.

Of course it’s incredibly important that when you’re using these files systems to back things up and I have a couple of different backup systems that I use professionally. One of them is the storage system that is provided to me in a shared drive by the unit that I work in and then also we have a google drive option at our institution that allows me to backup files as well so I’ve certainly used that. For personal documents I use a drop box system, so I backup items to drop box in addition to the backup storage that I have in my home.

The last piece of digital organization that I just discovered and still learning a lot about but I think has a lot of potential for me is reference management systems and so one of the things I’ve been using and learning more about is Zotero and this is something that I can link to and show notes to. This is a system where you can kind of catalog citations that you use, you can link those citations to PDF documents that you have of different articles and then the reference management system allows you to, it can kind of function in partnership with Microsoft word and then it will allow for you to put citations directly into documents either as internal citations or as references or footnotes and you can basically drag and drop directly from Zotero into your document.

This is also very helpful for me when I work with faculty or administrators who will come to me and say “Hey do you have any research you can point me to” on, for example, validating online learning and I’ll say absolutely and I’ll go into Zotero and I can search by my tag that says validation literature, I can pull up the studies that have been directly linked with that and I can create a citation list that I can then send off to the person who’s requested it and oftentimes I might even be able to tack on a pdf of an article if I think there is something in particular that I have stored in Zotero that would be helpful to them I can just attach it to the email and send it along. So Zotero I think also has a lot of potential when you’re working on multiple projects and juggling them at one time and you’re kind of not sure how to manage all the different citation and research that you’re doing. You could certainly create folders in Zotero that are project specific or tags that are project specific that will allow you to pull up the research that you’re doing and have it really at your fingertips.

The second area of keeping projects organized and at your fingertips that I want to talk about is the idea of note taking and I think that everyone kind of has their own strategies for notetaking. Some people are really more digitally minded with note taking and use something like ever note. Other people are more looking for paper based note taking and I think that it has a very personal choice and has a lot to do with how people have done this in the past. I think that we’re all kind of rooted in our strategies so I’m someone who primarily uses hand notes for notetaking but I have a system of notebooks that I use and I purchase them from a company ghostly which I can reference in the show notes where in the notebooks there’s actually a task, like an action items section for each page, each spread and I use that consistently when I’m working on my research projects or even just going to meetings that are related to research projects or collaborations so that I can really keep straight what are the things that I’m supposed to be working on and completing.

I also do have a research journal that I am very careful to index so that it’s easy for me to find things within that research journal. I don’t keep separate research journals for different projects. I really just keep the one and then I index it, a sum indexing with research journals I’ve seen as color coded which I think can be very helpful so that’s something to keep in mind. But I also think especially as I start using things like Zotero I can completely understand the draw to the digital particularly with functionalities like tagging where It makes things really easy to search and get things immediately at your fingertips and so I would love to hear from listeners if they’re using notetaking projects like Evernote or something else to really manage their research and juggle those projects.

The last thing that I wanted to talk about in terms of keeping projects at our fingertips was actually physical file keeping which I think when a lot of people thinking about things at your fingertips think about physical files and this is something that I’ve actually started to move away from in part just because there is so much functionality with the digital in terms of what you can do and I think that in particular what I found, especially when I switched from my last job to the current one I’m in is that a lot of my files were actually pdf documents, articles that I’ve worked on that were related to my research and that I had made notes on or something like that but were easily scan able and that I could put into a citation management system like Zotero and not feel like I needed to keep a physical file. The other things that I found was I often had multiple copies of the same article and I just didn’t realize it so you kind of loose track when you have all these research projects of the overlap between the different projects and something like Zotero when you can tag different articles to different projects you get a better sense of where the overlap is within your research and I find really helpful. So when it comes to physical file keeping, and I’ll ask this question to the listeners.

I’d love to hear from you, do you think it’s necessary to keep paper files and if you do related to your research what kind of things are you keeping? I think that this is also something that must be very personal for someone to think about the kinds of things that they want to keep.

One things that I do keep paper copies of although I also have a file for it in Zotero are the things that I have published. I like to have tangible copies of that on hand just in case I need to give it to someone. But also now I’m finding so much people are requesting things digitally so I’m not even sure I need that paper filing system anymore. So I hope that talking about these strategies for getting things out of your head, for sharing the load and being accountable and for keeping projects organized and at your fingertips helpful.

I would again love to hear from you, please feel free to complement on this episode notes, or find me on twitter again you can find us @RIA\_Podcast on twitter and if you do comment on the show please use the hashtag #RIA\_Podcast. Thanks so much for listening and we’ll be back with another episode next week.

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