Episode 83: Katie Linder

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# KL: You’re listening to “Research in Action”: episode eighty-three.

# [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. Along with every episode, we post show notes with links to resources mentioned in the episode, full transcript, and an instructor guide for incorporating the episode into your courses. Check out the shows website at ecampus.oregonstate.edu/podcast to find all of these resources.

**KL:** Hey there, Research in Action listeners. I’m on my own today, offering you a solo episode on strategies for keeping your research organized. Now this is something I talked to you about way back in the beginning of the show on episode 4, where I had a solo episode on juggling multiple projects that covered some organizational strategies. But in this episode, I want to dive a little bit deeper about how you can create organizational systems, how you can document your research, and how you can also plan projects through from the very beginning to make sure they’re organized in very specific ways that will help you throughout your research projects.

So in this first segment, I want to talk about creating organizational systems. And there’s a few reasons that I think that organizational systems for your research are especially helpful. The first one is that systems can really help you to establish habits. If you also do something kind of the same way, and you’ve set it up in a way where it’s kind of the right way to do it in terms of the ideal way that you might want to do it, it can help you to establish the habit where it feels a little bit like second nature that you do that thing. And I’ll give you some examples in just a moment. I also think that systems can also make it easier for you to locate weaknesses in a system that are causing inefficiencies. For example, I set up systems with the data in our research here at Oregon State Ecampus when I first started the research unit. But when I first started the research unit I was on my own, and now I’ve added staff. And those staff also need to access the different data pieces that we have, you know, older documents that we created for the research unit. We need to have a central space where everything can be housed, and everyone can access it, but then also where the data is secure. And so one of the things that we started to realize really early on when the staff was here was that there were bottlenecks of access to that research, because I had set up systems in a certain why where I really knew how they worked, but I hadn’t communicated how they worked to other people. So we were able to see immediately that there was a weakness in the system that was me, and I was the bottleneck to giving access to giving everyone access to what they needed, so we came up with a data storage plan, that really took into account what were the different kinds of things that we were trying to store, who needed to have access to them, what were the most secure places that we could put that data, and what would we think about in terms of archiving that data, you know, when we no longer needed it? So there’s lots of different systems that I’m going to run through here, but the general idea is that you can help make good habits for yourself, and that you could also then find out when systems aren’t working, it’s going to be a little bit more easy to find out those weaknesses if you’re doing it the same way each time.

So the first thing I think in terms of organizational system is your email. And I think that having a file folder system within your email or some other kind of system where you know that you’re always putting things in a certain place, or you’re creating certain tags for your email in a way that they’re very searchable for you. This is going to make it easy to correspond with coauthors for your research, with graduate students who might be working with you, with editors where you’re sending your research to. Whether it be a journal, or a publisher of books. But having an email file folder where you can find things very easily is very important. So in my email for example, one of the things that I do is create a new folder for every research project that we have and then I’ll create subfolders for those projects as well, so that I can keep that correspondence in a place where I can find it really easily. I am not someone who ever was kind of trained to search my email. Like I don’t have a million emails in my inbox. I keep my inbox zero as much as I can. And so the folder system is one that I’ve set up and that I know very well so it’s easy for me to find things. So recently, for example, we’re about to release the results of a national study – a national study that we’ve completed, and we’re organizing a bunch of webinars with recruitment partners who are helping us to disseminate the research information from the report that we’ve created. And I created a subfolder under my study folder for this particular research project, and I created a subfolders just called ‘webinars’ where I could keep all the correspondents with the five different organizations that we’re partnering with for the webinars, and I can make sure that if I have to go back and pick out any information about those, I know exactly where to go. So these kinds of email file folder systems can help with everything from, you know, the correspondence with IRB to when are you trying to disseminate that information and, you know, all of your correspondents with your publisher and all of those different kinds of things as well.

I briefly mentioned, but I also think it’s really important to go into a little bit more detail about data storage systems. And you want to think about where you’re keeping your active data, and where you’re going to archive your data, and also when you need to delete your data. Which in some cases is very clearly marked out by your IRB if you are doing human subjects research. So some IRBs and grants will require a kind of data management plan, and I think this is a lot easier to fill out when you already have a system in place, and you know exactly where your data is being stored within your institution in a secure way. And there’s a few different places where we can store data on our campus, um but we are careful not to put it in a shared folder system where other people can access it, and when we are storing it in the Cloud, we’re making sure that there are Cloud approved spaces that our institution has invested in. But having a data storage system, and we’ve actually written ours down, so we know kind of exactly where everything is supposed to go in case we need to refer back and double check that we’re putting data for certain projects in the right place. Now this was a data storage system that my staff and I coordinated together. We sat down and we had a meeting, we wrote up a google doc, and we kind of decided where everything was going to go, and now we’re going through the process of putting everything in its right spot. So this something that if you work in a research team, or if you have students that work for you, everyone needs to be on the same page so they know where all of the data is organized.

The third area for organizational systems is your digital files, and these are maybe where you have a system for labeling, a system for locating files, a system for locating your files that you need to be kind of thinking about, how can you keep your files tidy, so that you’re not going to lose anything, and I think that this is the most important part, especially of data storage, you know, once you have data come in, you’re often manipulating those files in lots of different ways, you’re maybe slicing and dicing that data, or you’re cleaning that data, and you don’t want to get into a situation where you’re not sure where you’re drawing that analysis from. And this is something that I think is a lot easier to do than people think. You know, you might think, “Well of course I’m going to keep these things organized” but then a year later you go into the files and you’re not really sure what’s going on there. So marking your files by date, or marking your files with very specific descriptions of what’s included in them can be very helpful for this. I also think it’s really helpful when you have data spreadsheets, and this is something I learned from one of our previous guests, Um Steve van Tuyl, who came on the show – is to have like a notes part of your spreadsheet, a notes sheet, so you can talk about what you’ve done with the data, and what exactly is in that file. That just stays with the file. So there’s lots of different ways I think to organize your digital files, but I think as long as you have a system that you understand, and that you can rely on, that’s the most important part.

Okay, so, the fourth area of creating organizational systems is your paper files. And I, this is one of those areas where I think even if you are trying your hardest to go completely digital and not to have paper files, you will eventually have something that is a paper file. I think we accumulate this even when we don’t intend to, and I have paper files related to my research for things that I presented at conferences if I had to print out a version of what I was presenting, or maybe I wanted a printed copy of my slides, um the conference agenda, or the booklet where it describes the presentation, I usually keep that and put it into a file. So a lot of my travel files and conference files are still paper files. Um even if I have versions of files digitally as well, there’s still paper files that I also keep. Especially when I’m going through multiple drafts of something like a book project or an article, I may print out certain versions of that so that I can read it on paper and do some editing on paper and not digitally. So again, we kind of accumulate these things even when we don’t attend to, and we want to make sure that we can find those things when we need to. So having system files even when you don’t use them as much as your digital files is really important.

And then the last area that I want to talk about in terms of organizational systems in this segment is citation management. And I want to refer to you back to episode 36 with Hannah Gascho Rempel when we talked about different citation management systems, and the importance of starting these as early in you research career as possible, but also how they can be really helpful even if you’re in midcareer or late career to learn a system like this. And this is something that I think I learned more in midcareer, and I still use it all the time, I use the Zotero, and we’ll be sure to link to that episode in the show notes if you want to take a listen. So, in this section I talked about creating organizational systems. I’m going to take a brief break, and then when I come back I’ll talk a little bit about documenting your research. Back in a moment.

# Segment 2:

**KL:** In the first segment I talked about some different kinds of organizational system that you can create for your research, and in this next section I want to talk about documenting your research. I think that keeping your research organized, one of the fue things you need to be thinking about is kind of logging and documenting all the things that you’re doing, and there’s a few different ways to kind of think about this. So the first area that I want to talk about in terms of documenting your research is any kind of communication that you have with your co-authors, and I think this is one of those areas where especially if you are working with people who are – everyone’s gathering data. Like maybe you share the load in terms of gathering data, or you have multiple different versions of an article floating around and everyone’s contributing to different drafts and things like that; having correspondence with co-authors that is logged, and dated, and that you have a record for, I think this is incredibly important. It helps you to know things like how long a project took to complete. It helps you to know who brought up certain ideas, because you might have proposed ideas in an email form where you’re offering an idea for the first time so you can get a sense of things like intellectual property. Um but this is just an area where you have a better sense I think of the team work that’s going on within a particular project if you’re documenting those conversations and communications with your co-authors.

A second area of documentations which I think is familiar to many people is IRB paperwork. And this is the paperwork that you complete when you do human subjects research, and we have a couple different episodes on IRB, which we will link to in the show notes. But your IRB paperwork is one of those things that I think sometimes we file it, and we get approved and then we kind of forget about it, and there’s so many things about the IRB paperwork that can be useful to us later on in our research, and we really should be referring back to it regularly to know for example, when that IRB paperwork is going to expire, or what exactly did we write in our data management plan about what we were going to do. We might be referring back to that paperwork because we did a nice literature review, and we want to use that in part of the write up of the results for our data. So IRB paperwork is another place where you can really document what’s going on within your study, and I can’t tell you how many times I open up IRB paperwork to go back and kind of look at things like research questions, and really fundamental things that we’re trying to decide at the very beginning of a research design. When we’re making decisions for IRB, it’s often really early days in the project, and I think those are things that you can forget or lose track of pretty easily. So that IRB paperwork as a document is really important.

I talked a little bit in the previous segment about clearly labeling your data sets. And this is something that I just cannot emphasize enough, and particularly because you might eventually be sharing your data with someone else. And if there is any chance, and even if you feel that there’s not any chance that you’re going to be sharing your data, it’s really important to label in a way that other people can understand it. And so I talked about in the other section about creating organizational systems and I gave the example about how I had created a system for myself, but that was not a system that really fit when I hired other staff to come work in the research unit. And so one of the things you want to think about with your systems, and also with documenting your research is, are other people going to understand the way that I have set this up? Is this logical? You know, does it make sense when I label my data this way that people would understand what it means? And often times we will use things like acronyms or short hands – that maybe we’ve used our entire research career, and we know exactly what that is. Maybe it’s a short hand that we picked up from our advisor, and they just kind of randomly made it up, and nobody else would ever know what it was. Unless they were under that person as an advisee as well. So making sure that you’re clearly labeling your data sets, and especially if you are parsing out your data in different ways or running different kinds of analyses on that data, that it’s really clear what you’ve done and that people could come up behind you and really understand what was going on in that data.

Now one area about documenting your research that I think we’re not really great about is updating our CVs. And this is something that I think you could put a tickler in your calendar maybe once a month, and just go into your CV and make sure that you’re putting in all of the different projects that you’ve been working on. If you are especially productive as a researcher, it can be so easy to lose track of something. And I find this kind of ironic now, because I remember thinking when I was a graduate student that I would never forget anything that I published. You know? This was going to be like burned into my brain because I spent so much time on the articles and things that I published early in my career. But now that I’ve published a lot more, I see how it is easy to kind of forget the things that we are putting out there with our research, and especially for people who have huge volumes of articles and other research outputs, it is really easy to lose track of those things. I think it’s also really easy to lose track of shorter term commitments like committees or boards that you might be asked to be on. Um some people are tracking the reviews that they do for journals, for service to the field. You know, all of those things can be just sort of a blip on the radar of our research careers. So I definitely recommend going into your CV once a month or so and just taking a look of what’s going on there. Now something else in terms of documenting your research and your career more generally is every once in a while to go into your CV, look at the different categories you’ve created for yourself, and see if they’re still serving you, and if there are other categories that need to be created. One example I have of this is recently I went into my CV and I’ve been running a lot of webinars lately, especially at Oregon State for the research outputs that we have for our reports, and I often partner with vendors to run these webinars, and I’ve also run some webinars for other organizations and things like that. And I did not have a space on my CV, I was just kind of lumping in those webinars with all the other invited presentations and talks that I do, and I have separate spaces on my CV for invited talks, for conference talks. But I was kind of putting the webinars into one of those two categories, and I was looking at my CV kind of more holistically and I realizing that I should probably have a category just called “Webinars”, because I do them quite a bit. It’s a different modality, it’s a different skill set to be able to run an affective webinar, so I ended up pulling that out, and putting it in a separate space on my CV. So sometimes if you can take a step back, and look at your CV and realize that you might have a separate section that you really need to pull out, and it makes more sense once you get later into your career, that you might find that you need to organize your CV in a different way. At this point my CV is on to I think its 18th page which is, you know, I’m mid-career. I’ve done a lot of publishing and presenting, and for some people that might sound long, for other people that might sound pretty short, but it’s long enough that it really does need to be organized in a way that people can look at it, and make sense of it because it’s so many pages at this point.

Alright. So the last part of documenting your research that I want to talk about is how you can create your spreadsheets that show progress on certain kinds of projects that are really multi-step projects, and especially when those projects are ones that are done with other people. So one example I have of this is a spreadsheet that my admin guru, uh a member of my team created for me for an edited collection that we’re working on. We’re actually working on two simultaneously right now within the research unit. And so she created these spreadsheets to help me track which of our authors had got their drafts in, where had we gotten feedback back to our authors, when did second drafts come in, had we done the final edits that we needed to, did we have their contributor agreements, did we have their updated bio statements. So, you know, all the different kinds of little pieces that go into creating edited collections, and she created a spreadsheet where we could track everything to make sure we knew exactly who was delinquent with their drafts, and if there were any that we hadn’t gotten the feedback to yet as well. So I can share an example of this spreadsheet in the show notes, but in some cases with our research projects I think it’s really helpful to document the progress so we can have a sense of how long things are taking, and are there certain tasks that maybe are a bottle neck, or are creating kind of barrier to getting the research done, and when you can document that progress and your process of completing the different tasks, it can just teach you something I think in the long run.

So one other area I want you to encourage to document your research is to create these sort of progress spreadsheets for the multistage projects that you have. Now this is also something that we’re starting to do for our longer projects, just kind of the projects where the design might take place in one year, but then we don’t really finish putting out all of the outputs from that research project for like 18 months. So it’s really helpful for us to track, when was the very beginning of this idea? And then how long did it really take us to go full cycle with design the project, recruiting, collecting data, analyzing that data, putting out a research report or other kinds of outputs, and when things were kind of finally in publication mode for that. You know, how long does it really take us to do that? And that allows us also to strategically plan within our research unit.

So in this segment I talked about several different ways to document your research. I’m going to take another quick break, and then in the next section I’ll talk about planning projects through from the very beginning. I’ll be back in a moment.

# Segment 3:

**KL:** In the last segment I talked about many different strategies for documenting your research, and in this final segment I want to talk about kind of the benefits and value of planning projects through from the very beginning and having an organized system for how to do that. So in episode 12 I do talk about creating a five year research plan, so that might be kind of interesting to you if this is a topic that as I’m talking through it you want to think about it from a more long term perspective of a multi-year plan , but what I want to talk about here is how you can plan your research projects through, kind of from soup to nuts, so that you know you have all of the different pieces in place and you can organize things from the very beginning. So let me talk through the different stages and what this might look like. So in the very beginning of a project, you have just your ideas and your brain storming, and you can think about, “Where can you collect this data information in a way that you’re going to be able to easily access it later on?” And in our research unit, we have ideas all the time all the time for different kinds of research projects, and we don’t want to lose them. We want to trap them in a place where maybe we circle back to them later on because we’re busy now and our plate is full in terms of research projects, but at some point we’re going to have an opening and we’re going to want to look at the different things that we brain stormed, so we try to keep all of those things in one place.

Then you also have your research design, once you’ve picked your idea and you know what you’re going to move forward with, by looking at your research design from kind of all angles and also thinking about, how does your research design dovetail with things like recruitment and data collection? You’re able to plan out and kind of strategically plan out, a lot of the different aspects that you might need for your project, especially if you’re working with human subjects. And so your IRB proposal includes a lot of this strategic planning and the different pieces that you need to know from the very beginning. And I think it’s helpful when you can make these connections early on between things like your research question and your research design, because it can save you a lot of work later if you have in mind a clear structure of what you’re trying to do, where you’re trying to gather data from. It can save you a lot of time in terms of reaching out to different partners that you need to connect with or paperwork that you might need to fill out to make sure you have permissions to do different things with your research project. So knowing all of that early on can be super helpful.

Having systems, like I mentioned earlier, for things like data storage can also help you when you’re going through your IRB proposal, when you’re thinking about data collection, so that when you are getting your data in the door, like you’ve done the recruitment, and you’ve collected the data, or you’re just gathering the data from whatever sources your research project requires, you know exactly where that data needs to go and you have a system in place so you’re not concerned that you’re going to lose anything or you have backups in place. You know, you’re not going to lose data if your computer dies or something like that. You have a backup system, and you have an organizational structure to make sure you’re not going to lose that.

Then of course you have your data analysis and there’s so many different ways to organize this based on your method. Um but thinking about how can you do your data analysis in a systematic way? How can you have a sense of how long certain parts of your data analysis takes so that you know how to build into your schedule, and you can kind of guesstimate how long it should take you to complete that data analysis? And then as you’re working on your data outputs, planning your data outputs from the very beginning, helps you to know what kinds of things you’re looking for as you’re working through your data analysis. So this is an area where in [episode 42](http://ecampus.oregonstate.edu/research/podcast/e42/) we talked about with George Veletsianos, about sharing research online; how to have a dissemination plan from the very beginning of your project, and there’s so many different ways that you might disseminate the results from your studies. So here at Ecampus for example, we do reports, we do peer reviewed articles, sometimes we do blog posts, webinars, short videos, conference presentations, as I mentioned we’re working on a couple edited collections right now. and there’s all these different kinds of ways we could possibly disseminate our data, and especially when we’re in the data analysis phase and we’re trying to think about what are most relevant to share about what’s coming out of our studies, it’s helpful to know what kinds of data outputs we’re trying to prepare because we can look for things like quotes or we can look for statistics we really want to highlight that are coming out of the research that might be relevant for our audiences.

The other piece too that I don’t think we always consider with data outputs is dissemination plans in terms of things like social media, and this something that George definitely touches on in episode 42, so if you’re interested swing back to that episode. Um but I think sometimes when we think about data output is we don’t necessarily take into account things like social media strategy, where we might want to be contacting people on social media to let them know that a certain output has been released, like a report, or we might want to be inviting certain people to a webinar that we’re hosting, or if we cite people in our study we might want to be contacting the people that we cite via social media or otherwise to invite them to attend the other kinds of events we have around the study results like conference presentations for example. So having those kinds of plans from the very beginning can help you be really organized and I think part of the challenge especially with dissemination plans and our data outputs is sometimes we think about those things in the moment. We do all the other work and then at the very last minute we think, “Okay. How are we going to share this out?” Where if we thought about that from the very beginning and planned for it from the very beginning, I think it’s a lot more organized.

And then the other piece that I think we often don’t plan an advance for, and it can really help a project to be very organized, is when is the close out period for our research project? And in some cases, for examples, the IRB will require that you have a certain time frame for your project, and that you analyze all of your data within a particular time period, and the that you get rid of that data. And having a sense of when you have that deadline for data deletion and also in terms of a research program close out, when are you going to update your CV? You know? Like all those things that need to be wrapped up before you move on to another project or before you kind of officially call a project completed, um it’s easy to make those things into a sort of checklist document that you can go through and just make sure, “Have I done all of the things that I want to do with this research project before I kind of close the door on it and move on?” Now I think research projects, it’s not always that easy, we don’t always close the door completely because often research – one research study will lead into another research study, and so you’re often referencing back and looking at your older research, but that’s especially a reason to make sure your research is organized, because if you have a later study that maybe you didn’t know you were going to be doing, but that really references back to something that you did in an earlier research project, you’re going to want to be able to make those connections in ways that are really compelling, and that often times means going back to your data and maybe reanalyzing it or drawing out things from the data that you hadn’t previously thought you needed to draw out.

So the more that you have organizational systems, and the more that your research, and the more that you plan your projects through from the very beginning, all of these thing scan give you excellent strategies and tools for making your research as efficient and effective as possible.

So thanks so much for listening to this week’s solo episode! I will make sure to link to all of the different things that I mentioned in the show notes, and will be back next week with another episode!

# Show notes with links to resources mentioned in the episode, a full transcript, and an instructor’s guide for incorporating the episode into your courses, can be found at the show’s website at [ecampus.oregonstate.edu/podcast](http://www.ecampus.oregonstate.edu/podcast).

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