WORKSHEETS

[Project Management for Researchers: A Practical, Stress-Free Guide to Getting Organized](#)
by Shiri Noy

CONTENTS

Worksheet 1.1 Project Goal Worksheet

PRACTICALITY

PROJECT GOAL

DETAIL FOR THE GOAL ABOVE: WHAT THE MEASURABLE, TIME-BOUND, ETC. ASPECTS OF IT ARE.

SPECIFIC:

MEASUREABLE:

ACHIEVEABLE:

RELEVANT:

TIME-BOUND:

GIVEN THE ABOVE, IS THERE ANYWAY TO REFINE AND RESTATE THE GOAL TO INCORPROATE THE S.M.A.R.T. COMPONENTS ABOVE?

PROJECT GOAL REVISED

Worksheet 1.2 Project Outputs and Outcomes

OUTPUTS AND OUTCOMES

PROJECT GOAL

BELOW, BRAINSTORM SOME PROJECT OUTPUTS OR SPECIFIC
PRODUCTS AND SEPARATELY THE BROADER OUTCOMES OF YOUR
PROJECT. YOU MIGHT HAVE JUST ONE OF EACH OR SEVERAL.

OUTPUTS	OUTCOMES
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

Worksheet 1.3 Ethical Considerations Brainstorming Worksheet

ETHICAL CONSIDERATIONS

CONSIDER INSTANCES IN YOUR RESEARCH WHERE YOU HAVE
HAD TO MAKE DECISIONS YOU FOUND MORALLY OR ETHICALLY
CHALLENGING. WHAT HAS GUIDED YOUR DECISION MAKING?
WHAT KINDS OF VALUES WOULD YOU LIKE TO UPHOLD IN YOUR
RESEARCH?

1.
2.
3.
4.
5.

Worksheet 2.1 Project Tasks Worksheet

TAKING STOCK: PROJECT TASKS

PROJECT GOAL

BRAIN DUMP

LIST ANY PROJECT TASKS THAT COME TO MIND.

BIG TASKS

GROUP THE ABOVE INTO TASKS AND SUB-TASKS. BELOW LIST THE BIG TASKS ASSOCIATED WITH YOUR PROJECT, FOR EXAMPLE, SURVEY DATA COLLECTION.

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Worksheet 2.2 Taking Stock of Resources for the Project Worksheet

TAKING STOCK

NOW, PUTTING ASIDE THE SPECIFIC TASKS, TRY TO ESIMATE THE TIME, SKILLS, MONEY, ETC. NEEDED FOR YOUR PROJECT COMPLETION. NOTE: ONE OF THESE MAY HAVE ALREADY BEEN DECIDED FOR YOU, FOR EXAMPLE, YOU MIGHT HAVE A SET BUDGET OR TIMELINE.

DIMENSION	NEED	HAVE
TIME		
SKILLS		
MONEY		
EQUIPMENT/ TOOLS		
APPROVALS/ BUY-IN		

Worksheet 2.3 Taking Stock of Resources by Tasks Worksheet

TAKING STOCK: TASKS

BELOW, FILL IN DIMENSIONS, BUILDING ON THE ABOVE FOR EACH OF THE TASKS YOU IDENTIFIED. THIS WILL HELP YOU ENVISION BOTH THE SPECIFICS AND THEIR RELATIONSHIP TO THE OVERALL PROJECT.

	TIME	SKILLS	MONEY	EQUIPMENT/ TOOLS	APPROVAL/ BUY-IN
OVERALL PROJECT					
TASK 1:					
TASK 2:					
TASK 3:					
TASK 4:					
TASK 5:					
TASK 6:					
TASK 7:					
TASK 8:					
TASK 9:					
TASK 10:					

Worksheet 2.4 Data Management Worksheet

DATA MANAGEMENT

DRAWING ON THE TEMPLATE PROVIDED IN THE CHAPTER, ANSWER THE
QUESTIONS FOR EACH PLAN ELEMENT BELOW.

ELEMENT	PLANS
DATA COLLECTION	
DATA ANALYSIS	
DATA DESCRIPTION	
DATA STORAGE	
DATA ACCESS	
DATA MANAGEMENT AND SHARING	

Worksheet 3.1 Tasks and Priorities Worksheet

TASKS AND TOOL PRIORITIES

RESEARCH PLAN TASKS AND TOOL PRIORITIES

BELOW, LIST YOUR PRIMARY TASKS AS OUTLINED IN CHAPTER 1 (E.G., DATA COLLECTION, OR MORE SPECIFICALLY SURVEY DATA COLLECTION, ETC). AND THEN LIST THE PRIORITIES FOR THAT TASK (E.G., INTUITIVE, EXPORTABLE TO EXCEL, ETC).

TASK	PRIORITIES

Worksheet 3.2 Tool Selection Worksheet

TOOL SELECTION

TASK:

TOOL BRAINSTORMING

Possible Tools	Notes

IS THERE AN OBVIOUS CHOICE?

YES:

IF NO, LIST THE TOOLS YOU WANT TO EXPLORE FURTHER BELOW

1.
2.
3.

THEN, PUT A 45 MINUTE SLOT FOR EACH IN YOUR CALENDAR FOR THE NEXT TWO WEEKS. SEARCH FOR EACH ON THE INTERNET AND SEE WHAT PEOPLE SAY, EXPLORE THEM, ASK OTHERS IF THEY'VE USED THEM AND FOR ADVICE, CONTACT WHOEVER MIGHT IMPACT YOUR CHOICE (E.G., IRB), AND TAKE NOTES BELOW:

Possible Tools	Notes

FINAL DECISION

TOOL FOR TASK:

Worksheet 4.1 Creating Folders Worksheet

CREATING FOLDERS

PROJECT:

FOLDER LIST
MAKE A LIST OF THE FOLDERS (E.G., IRB) AND THEIR ANTICIPATED CONTENTS IN BROAD TERMS (E.G., IRB PROPOSAL, IRB APPROVAL, ETC.) THAT YOU KNOW OR THINK YOU WILL NEED FOR THE PROJECT, BASED ON PREVIOUS EXPERIENCE OR ANTICIPATED FILES.

FOLDER	CONTENTS

Worksheet 4.2 Folder Structure Worksheet

FOLDER STRUCTURE

PROJECT:

NOW, ORGANIZE THOSE FOLDERS INTO A NESTED STRUCTURE AND GIVE THOSE FOLDERS NAMES. IN DOING SO, TRY TO REFRAIN FROM NESTING BEYOND FOUR LAYERS. THINK ABOUT HOW YOUR FILES RELATE TO EACH OTHER, AND TRY TO GROUP THEM IN THOSE WAYS. THINK ABOUT HOW YOU WORK AND HOW YOU WANT TO ORGANIZE YOUR WORK: IF YOU ARE WRITING MULTIPLE PAPERS IN A PROJECT, DO YOU WANT THOSE TO EACH HAVE THEIR OWN FOLDER? DO YOU WANT THAT NESTED UNDER A "DRAFTS" OR "PAPERS" FOLDER OR FOR EACH TO STAND ALONE?

FOLDER	FIRST LEVEL SUB-FOLDERS	SECOND LEVEL SUB-FOLDERS	THIRD LEVEL SUB-FOLDERS

Worksheet 4.3 Naming Files Worksheet

NAMING FILES

PROJECT STUB NAME:

YOU WILL FIRST WANT TO BRAINSTORM THE TYPES OF FILES YOU WILL HAVE, INCLUDING THOSE USED FOR DATA (E.G., DATASETS, DO-FILES) AND THEN INDICATE YOUR NAMING CONVENTION (E.G., STUB_ANALYSIS_V1.0.DO), DRAFTS, METADATA, AND ANY OTHER TYPES OF FILES YOU ANTICIPATE YOU WILL HAVE.

TYPE OF FILE	NAMING CONVENTION

Worksheet 4.4 Metadata Worksheet

METADATA

PROJECT STUB NAME:

TRY TO ANTICIPATE THE TYPE OF INFORMATION YOU WILL NEED ABOUT YOUR DATA (E.G., INTERVIEW LENGTH) BASED ON YOUR PREVIOUS EXPERIENCE WITH REPORTING AND PUBLISHING RESULTS, ARTICLES YOU'VE READ, AND SO FORTH. YOU MAY WANT TO DO THIS SEPARATELY FOR DIFFERENT TYPES OF DATA. YOU CAN THEN INCLUDE THIS IN YOUR METADATA SPREADSHEET (OR DOCUMENT IF YOU WISH).

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.
17.
18.
19.
20.

Worksheet 4.5 Research Log Worksheet

RESEARCH LOG

PROJECT STUB NAME:

WHAT INFORMATION TO INCLUDE BELOW: LIST THE TYPE OF INFORMATION YOU WANT TO RECORD IN YOUR RESEARCH LOG. THESE SHOULD PROBABLY INCLUDE IMPORTANT ANALYSIS DECISIONS (E.G., ADDITIONAL MODELS) AND WHERE TO FIND INFORMATION (E.G., CODEBOOKS OR RECEIPTS).

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Worksheet 4.6 Research Log Organization Worksheet

RESEARCH LOG ORGANIZATION

PROJECT STUB NAME:

NOW THAT YOU HAVE THOUGHT ABOUT WHAT INFORMATION YOU WANT TO RECORD, YOU WILL WANT TO THINK ABOUT HOW YOU WANT TO ORGANIZE IT. BELOW, GROUP THE INFORMATION YOU HAVE DECIDED TO INCLUDE INTO HEADERS AND SUBHEADERS AS WELL AS THE INFORMATION INCLUDED.

HEADER	SUB-HEADER	INFORMATION

Worksheet 5.1 Administrative Data Brainstorming Worksheet

ADMINISTRATIVE DATA

PROJECT STUB NAME:

TRY TO ANTICIPATE THE TYPE OF ADMINISTRATIVE INFORMATION YOU WILL NEED AND WANT TO KEEP TRACK OF, FOR EXAMPLE, ACCOUNT NUMBERS, SPENDING, AND SO ON.

1.
2.
3.
4.
5.
6.
7.

Worksheet 5.2 The "Admin" Folder Organization Brainstorming Worksheet

THE "ADMIN" FOLDER

PROJECT STUB NAME:

USE THE SPACE BELOW TO DECIDE ON YOUR FOLDERS, THEIR FILES, AND
WHETHER YOU NEED AN INDEXING WORKBOOK/ SPREADSHEET(S) OR
OTHER WAY TO KEEP TRACK OF CONTENTS, AND IF SO, WHAT KIND. IF
YOU DECIDE YOU NEED THIS, FOR EXAMPLE, A SPREADSHEET FOR
EXPENDITURES IN ADDITION TO RECEIPTS, LIST THIS UNDER THE RELEVANT
SUB-FOLDER.

NAMES OF SUB-FOLDERS IN THE "ADMIN FOLDER"	CONTENTS

NEXT, CONSIDER HOW YOU WILL WANT TO INDEX THIS FOLDER: A
SPREADSHEET, DOCUMENT, SECTION IN YOUR RESEARCH LOG?
WHAT KINDS OF INFORMATION WILL YOU WANT TO DOCUMENT ABOUT
YOUR "ADMIN" DATA IN THIS FOLDER?

Worksheet 6.1 Desirable Attributes of a Research Manager

DESIRABLE ATTRIBUTES IN A RESEARCH MANAGER

BELOW YOU LIST THE ATTRIBUTES YOU FIND VALUABLE IN A
MANAGER. THEN THE BEHAVIORS YOU ASSOCIATE WITH THOSE
ATTRIBUTES.

ATTRIBUTE	ASSOCIATED BEHAVIORS

Worksheet 6.2 Operationalizing Desired Behavior

OPERATIONALIZING DESIRED BEHAVIOR

PROJECT STUB NAME:

THINKING MORE CONCRETELY ABOUT HOW TO OPERATIONALIZE THE BEHAVIORS YOU BRAINSTORMED IN THE PREVIOUS WORKSHEET, USE THE SMART FRAMEWORK FROM CHAPTER 1, TRYING TO BE AS SPECIFIC AS POSSIBLE ABOUT HOW TO IMPLEMENT THIS BEHAVIOR IN YOUR PROJECT MANAGEMENT SYSTEM.

BEHAVIOR	OPERATIONALIZATION
	•
	•
	•
	•
	•
	•
	•

Worksheet 6.3 Co-authorship Brainstorming Worksheet

CO-AUTHORSHIP WORKSHEET

LIST THE KINDS OF WORK ON A RESEARCH MANUSCRIPT
(WHETHER ARTICLE, REPORT, ETC.) THAT YOU BELIEVE WOULD MERIT
AUTHORSHIP.

1.
2.
3.
4.
5.

ADD ANY RELEVANT QUALIFIERS OR IDEAS ABOUT THE ABOVE (E.G., ARE
THERE ANY CIRCUMSTANCES UNDER WHICH WHAT
YOU LISTED ABOUT WOULD NOT MERIT CO-AUTHORSHIP). TAKE ANY
NOTES BELOW OF THINGS YOU MIGHT WANT TO THINK
FURTHER ABOUT OR DISCUSS WITH OTHERS (MENTORS, PEERS,
COLLEAGUES) IN THINKING ABOUT CO-AUTHORSHIP.

Worksheet 6.4 Co-authorship Worksheet for a Specific Project

PROJECT SPECIFIC CO-AUTHORSHIP WORKSHEET

PROJECT STUB NAME:

WHAT ARE THE OUTPUTS FOR YOUR PROJECT? RE-LIST THEM HERE (AND EDIT OR UPDATED THEM IF NEEDED).

THEN, WITH AN EYE TO THE SPECIFIC COMPONENTS AND NEEDS FOR EACH OUTPUT, LIST ANY POSSIBLE CO-AUTHORS THAT YOU ANTICIPATE MIGHT BE INTERESTED IN BEING INCLUDED.

THEN, IN THE THIRD COLUMN, INDICATE WHAT TYPE AND QUANTITY OF WORK YOU WOULD EXPECT FOR CO-AUTHORS ON THAT OUTPUT.

OUTPUT	POTENTIAL/ KNOWN CO-AUTHORS	WORK EXPECTATION OF CO-AUTHOR

Worksheet 7.1 Anticipated Communication Modality and Frequency Worksheet

COMMUNICATION FREQUENCY AND MODALITY

PROJECT STUB NAME:

FIRST, FOR THIS PROJECT LIST THE PEOPLE YOU ALREADY KNOW WILL BE WORKING ON IT, AND ANTICIPATE ANY ADDITIONAL PEOPLE YOU PLAN OR WOULD LIKE TO INCLUDE. START WITH YOURSELF, THEN INDICATE THE FREQUENCY AND MODALITY OF EXPECTED COMMUNICATION.

PERSON/ROLE	MODALITY	FREQUENCY

Worksheet 7.2 Check-in Worksheet

CHECK-INS

PROJECT STUB NAME:

EXPANDING ON THE ABOVE WORKSHEET, NOW CONSIDER THE AGENDA
OF CHECK-INS, AND NOTE THAT YOU MIGHT NEED MORETHAN ONE
CHECK-IN IN TERMS OF FREQUENCY OR GOAL FOR A
SINGLE PERSON OR ROLE.

PERSON/ROLE	FREQUENCY	AGENDA
		•
		•
		•
		•

Worksheet 7.3 Priority Checklist: Urgent/Important

PRIORITIES WORKSHEET

PROJECT STUB NAME:

USE THE BELOW TEMPLATE OF THE EISENHOWER MATRIX TO CATEGORIZE VARIOUS RESEARCH TASKS.

	URGENT	NOT URGENT
IMPORTANT		
NOT IMPORTANT		

Worksheet 7.4 Scheduling Tasks Worksheet

SCHEUDLING WORKSHEET

PROJECT STUB NAME:

REVIEW YOUR POPULATED EISENHOWER MATRIX AND DECIDE

WHICH TASKS YOU WANT TO "FIX" IN YOUR SCHEDULE AND WHICH YOU MIGHT WANT TO KEEP VARIABLE. LIST THE TASK, FREQUENCY, AND SCHEDULE—IDEALLY AN ACTUAL DAY AND TIME.

TASK	FREQUENCY	SCHEDULED FIXED TIME

NEXT, CONSULT YOUR SCHEDULE WHEREVER YOU KEEP IT (PLANNER, DESKTOP CALENDAR, ONLINE, ETC.) AND FOR THE NEXT WEEK/MONTH/YEAR, DEPENDING ON FREQUENCY, ENTER THESE TASKS AS WELL AS THE CHECK-INS YOU DECIDED ON IN THIS CHAPTER INTO YOUR CALENDAR TO "PROTECT" THAT TIME FOR THAT PURPOSE. IF THERE'S A TASK YOU WANT TO SCHEDULE AND "FIX" WEEKLY, YOU MIGHT WANT TO TRY IT AT A PARTICULAR DAY/ TIME FOR A MONTH AND REVISIT AFTER THE FIRST MONTH TO SEE IF THAT TIME WORKS. IF THAT IS THE CASE, JUST NOTE THAT YOU WILL REVISIT THE TIME/DATE AT THE END OF THE MONTH IN YOUR CALENDAR.

Worksheet 8.1 Diagnosis Worksheet

DIAGNOSIS WORKSHEET

PROJECT STUB NAME:

IDENTIFY PROBLEMS OR ISSUES THAT YOU HAVE ENCOUNTERED IN YOUR PROJECT. THEN IDENTIFY THE CAUSES, AND REMEMBER THAT THIS MAY REQUIRE CONVERSATIONS WITH OTHERS WORKING ON THE PROJECT.

PROBLEM/ISSUE	CAUSE(S)

REFLECTION

Worksheet 8.2 Brainstorming Adjustments

BRAINSTORMING ADJUSTMENT

PROJECT STUB NAME:

PROBLEM/ ISSUE	POTENTIAL BRAINSTORMING PARTNERS	POSSIBLE ADJUSTMENT

Worksheet 8.3 Adjustment Pros and Cons Worksheet

ADJUSTMENT PROS AND CONS

PROJECT STUB NAME:

PROBLEM/ISSUE:

POSSIBLE ADJUSTMENT 1:

PROS

CONS

POSSIBLE ADJUSTMENT 2:

PROS

CONS

POSSIBLE ADJUSTMENT 3:

PROS

CONS

POSSIBLE ADJUSTMENT 4:

PROS

CONS

SELECTED ADJUSTMENT(S):

Worksheet 8.4 Adjustment Implementation Worksheet

ADJUSTMENT IMPLEMENTATION

PROJECT STUB NAME:

PROBLEM/ISSUE:

SELECTED ADJUSTMENT(S):

STEPS TO ADJUSTMENT IMPLEMENTATION

TIMELINE

Worksheet 8.5 System-Level Adjustments

SYSTEM-LEVEL ADJUSTMENTS	
PROBLEM/ISSUE	SYSTEM-LEVEL ADJUSTMENT

Worksheet 9.1 Project Completion Worksheet

PROJECT COMPLETION WORKSHEET

PROJECT STUB NAME:

WHEN IS YOUR PROJECT COMPLETE BASED ON THE BELOW DIMENSIONS? ARE ANY OF THESE NECESSARY AND/OR SUFFICIENT FOR PROJECT COMPLETION?

OUTPUTS/PRODUCTS

TIMELINE

BUDGET

Worksheet 9.2 Post-Project Completion Reflection Worksheet

POST-PROJECT REFLECTION WORKSHEET

PROJECT STUB NAME:

PROJECT GOAL

PROJECT OUTPUTS

BUDGET

TIMELINE

WHAT WENT WELL

WHAT COULD HAVE BEEN BETTER

WHAT CAN WE IMPROVE FOR THE FUTURE

Worksheet 10.1 Your Researcher Characteristics

YOUR RESEARCHER CHARACTERISTICS

1.
2.
3.
4.
5.

Worksheet 10.2 Adjusting Your Management System to Your Style

ADJUSTING YOUR MANAGEMENT SYSTEM TO YOUR STYLE

CHARACTERISTIC	BENEFITS	CHALLENGES	RESEARCH PROJECT MANAGEMENT ADJUSTMENTS