Jump Starting Your Research and Scholarship Program

Developing a Strategic Plan to Achieve Your Research, Scholarship, and Creative Goals

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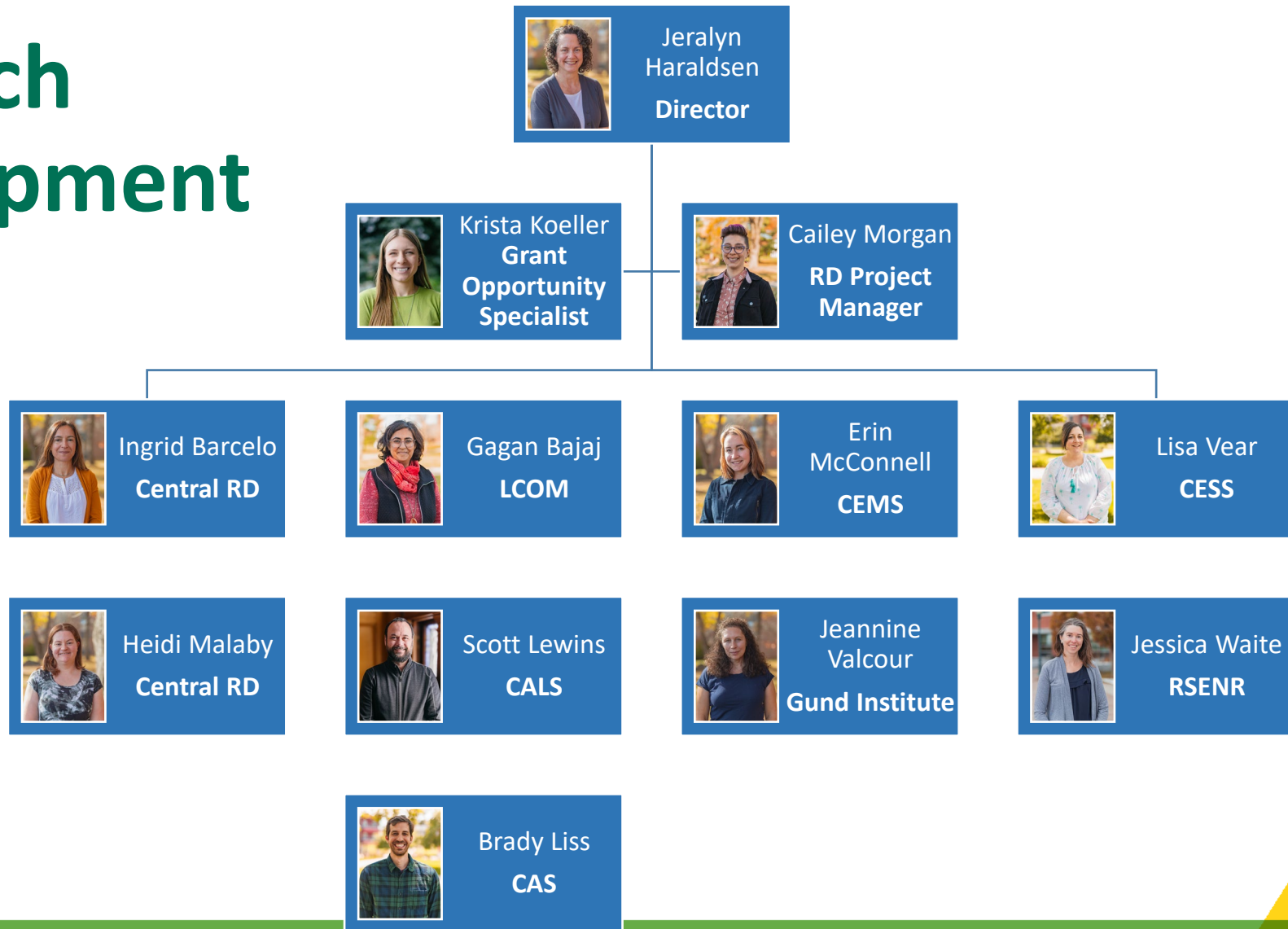Life Sciences (CALS)
Research Development*

The University of Vermont
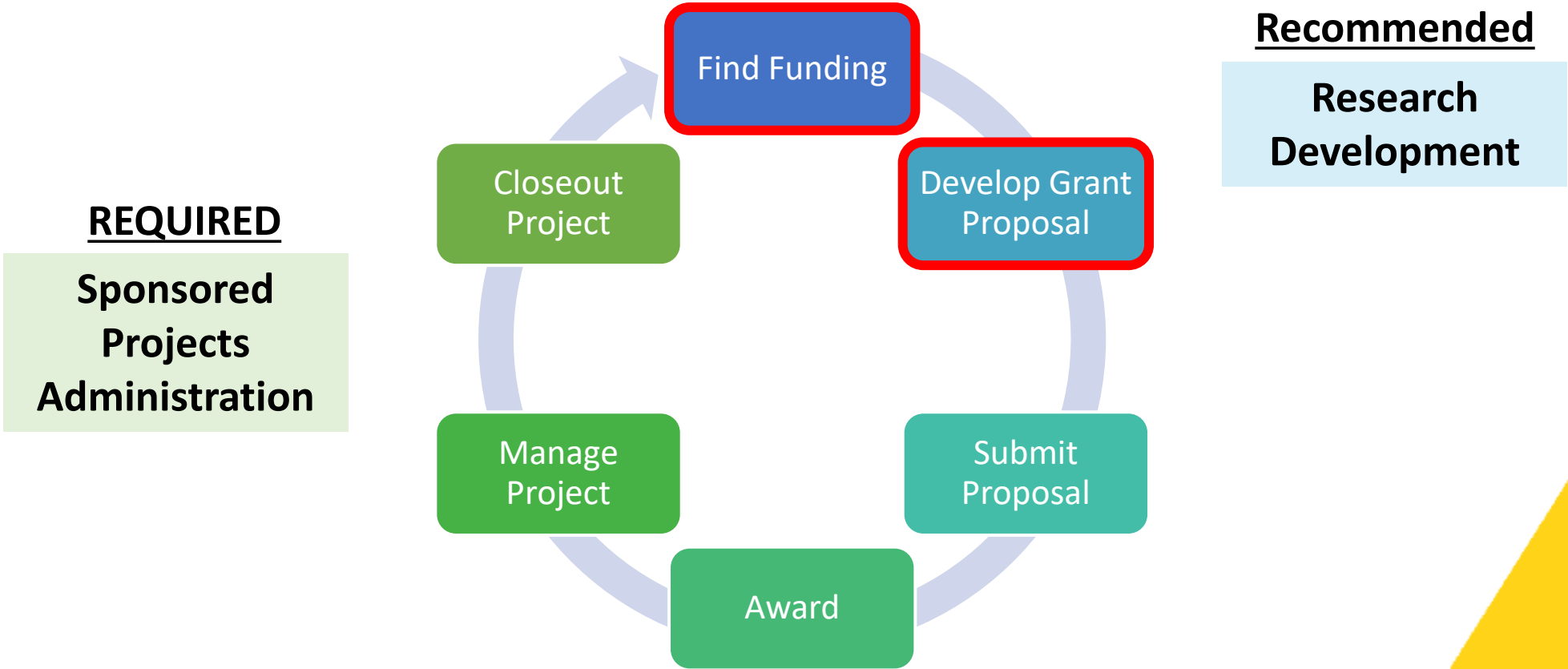
Housekeeping & Ground Rules

- **We affirm all aspects of identity**
  - neurotypes, gender, sexual orientations, race, disability, ethnicity, and all other forms of diversity

- **All forms of participation are okay**
  - Speak, gesture, emoticons/reactions, mix/match
  - Walk, move around, fidget, eat/snack, take breaks

Research Development

The lifecycle of an extramurally funded project

Recommended

Research Development

REQUIRED

Sponsored Projects Administration

Find Funding

Develop Grant Proposal

Submit Proposal

Award

Manage Project

Closeout Project

The University of Vermont

RD — **RESEARCH DEVELOPMENT**

- People- & Idea-focused
- Pre-pre-award
- Strategic, Big-picture
- Resource Development
- Grant Writing & Editing
- Large-scale Proposal Support
- Team Science
- Research & Opportunity Communication

FUNDING SUCCESS

RA — **RESEARCH ADMINISTRATION**

- Policy-focused
- Pre- & Post-award
- Submission Process
- Application Components
- Budgets & Contracts
- Financial Management
- Streamlining Processes
- Compliance

CREDIT: JILL JIVIDEN

The University of Vermont

Mid-career: Can be <u>both</u> exciting and overwhelming

What do your next 5 years look like?

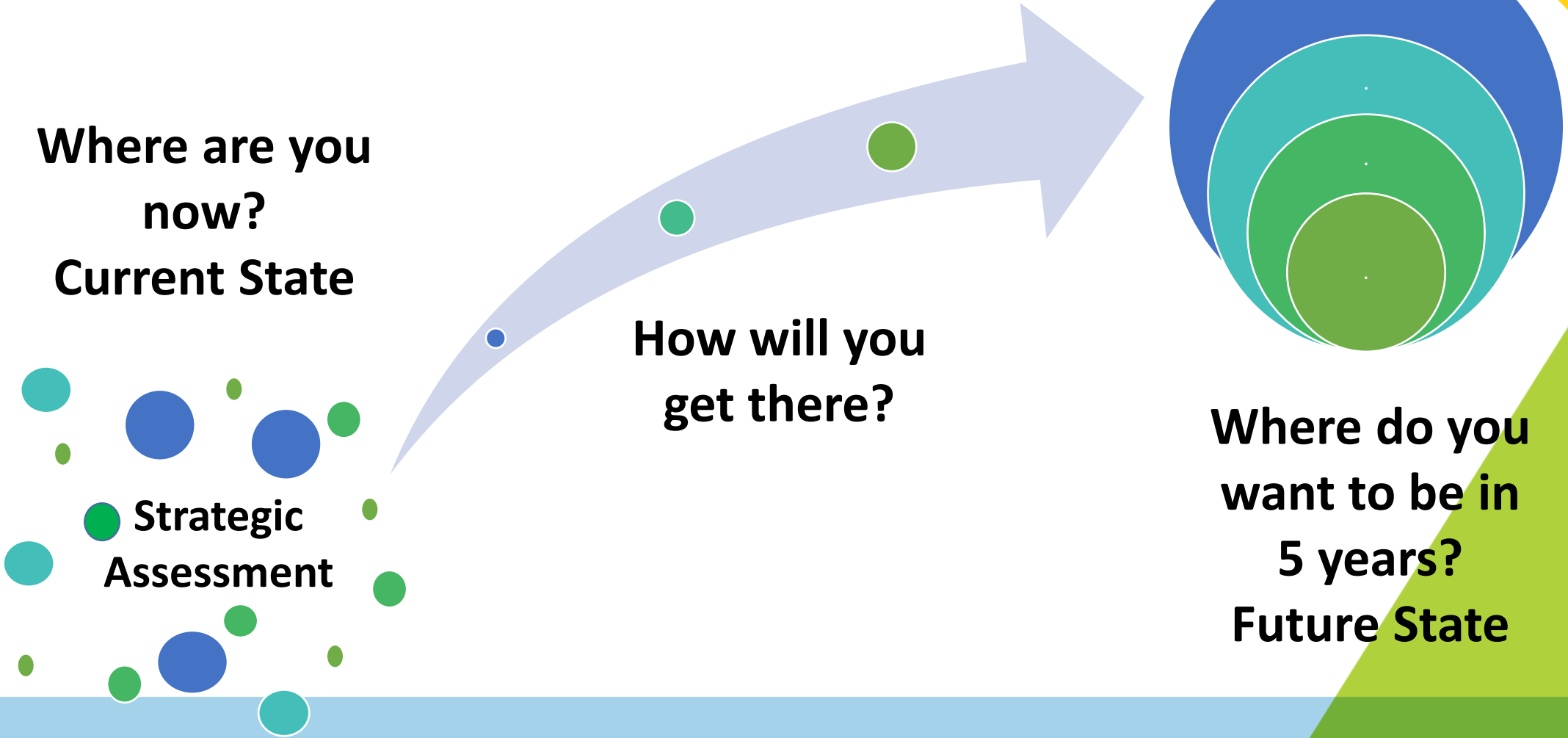Expanding or growing research/scholarship you're already engaged in?

Moving into a completely new research/scholarly direction?

Do you need additional resources or personnel?

Prioritize creating a strategic plan for your research, scholarship, or creative activity. It ultimately helps to decrease the overwhelm and use your time more efficiently.

What is strategic planning?

Where are you now?
Current State

How will you get there?

Where do you want to be in 5 years?
Future State

Strategic Assessment

Why strategic planning?

- Takes you outside of the day-to-day activities and forces you to reflect on the "big picture"

- Gives you clarity about what you want to achieve and creates a plan of actions, initiatives

- Helps to align your values, resources, and time to the activities with the most beneficial impact

Why invest your time in planning?

Planning <u>is</u> "getting to work"

If you don't know where you're going, how will you get there?

20-30% of time planning = smooth sailing
Boring is **good** (especially for executing projects!)

Doing it "on the fly" = rough seas
No one wants this ride... STRESS!

Scaffold of a strategic plan

- Define your long-term research/scholarly vision

  - What are your *values*?

- Self-evaluation

  - Strengths and weaknesses (SWOT)

- Define short-, mid- and long-term goals to achieve vision

- Implementation

- Regular review, revision, realignment

- Understand expectations / metrics by which your success will be measured during this stage in your career
  https://www.uvm.edu/provost/reappointment-promotion-and-tenure-rpt

Define long-term research/scholarly vision

- What do you want to accomplish in the next 5 - 10 years (or more)?

- What is your mission or purpose? Maybe write your own mission statement https://andyandrews.com/personal-mission-statement/

- What difference or impact do you want to make?

- What critical issue(s) do you want to respond to?

- What should your priorities be? Where should you allocate time and resources?
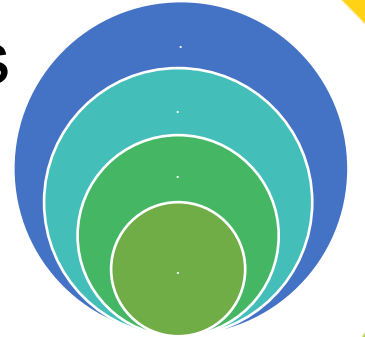
What does "success" look like for YOU?

- Publications, book chapters

- Performances, juried exhibitions

- Field work

- Invited talks

- Grants or Fellowships awarded

- Professional, institutional awards

- Advising / mentoring track record

- Policy changes / new service initiatives

- Broader Impacts of your work

- Creating a new Center

Understand the expectations / metrics :

- Promotion and tenure guidelines

- Norms within your research / scholarly / creative community

Success is not a destination; it's a process.
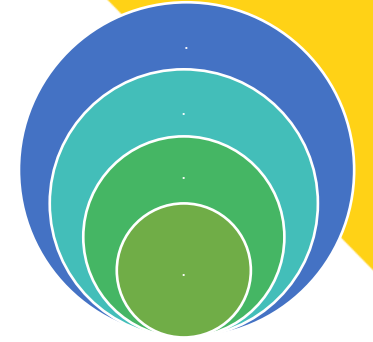
Breakout Session 1. (15 minutes)
Discuss your long-term research/scholarly vision

Where do you want to be as a researcher/scholar in 5 years?

Where/how do you want to make an impact?

What does success look like to you?

Strategic assessment: What is the status of your research/scholarship/creative activity right now?

- Is it an area you are still passionate and enthusiastic about?

- Do your current activities and plans align with your values?

- Do you have a strong publication record or scholarly output that will support your chosen area of research/scholarship?

- Is your research/scholarship in an exciting, vigorous, high-impact area?

- Is it in an area that is likely to be funded by federal agencies or foundations?

Strategic Assessment

Defining your Research Impact Identity

What I WANT to do?

Impact sweet spot!

You

What SHOULD I Do?

Field

Capacity

What CAN I do?

Society
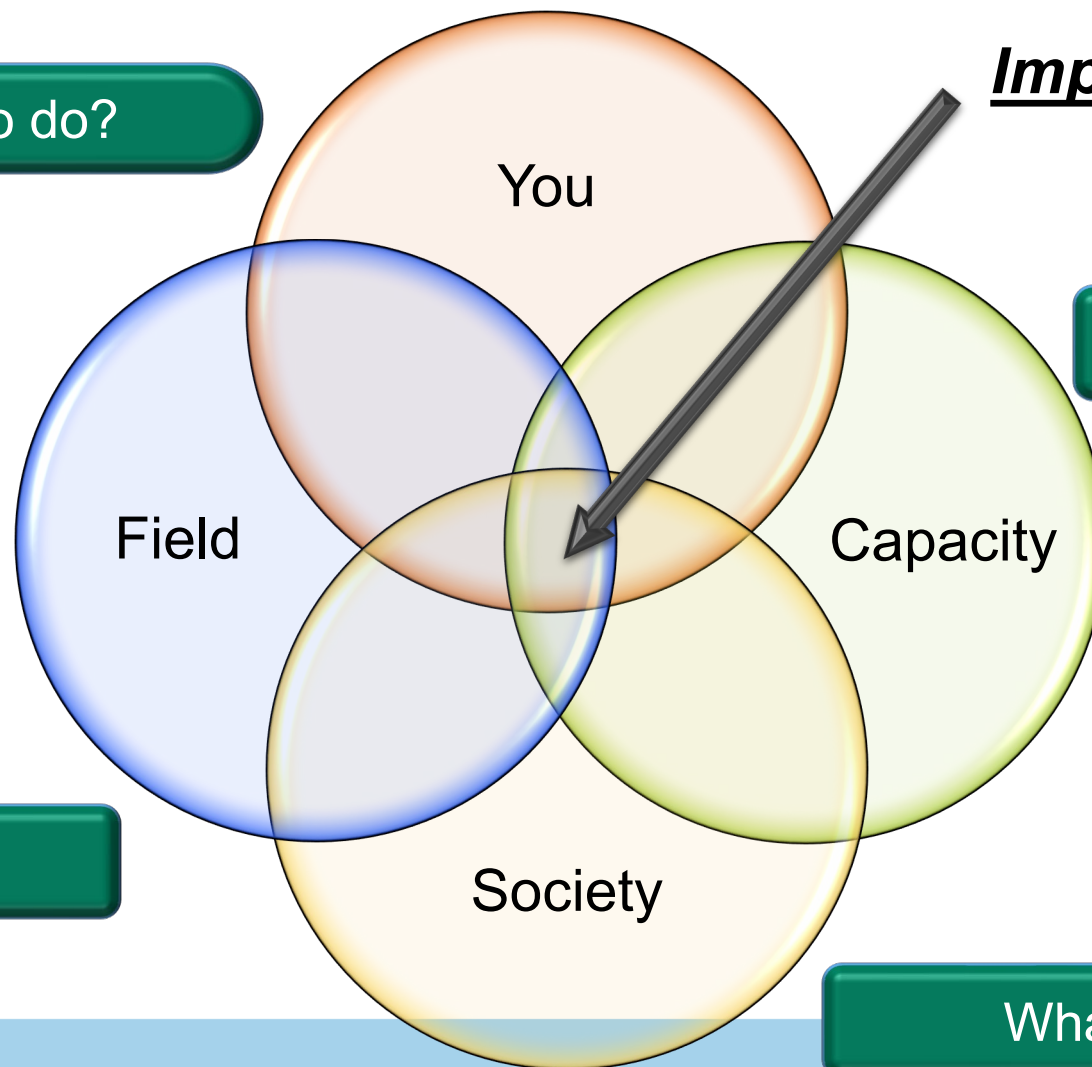
What is needed?

Breakout Session 2. (10 minutes)
Strategic Assessment of Current State

Does your current research/scholarship align with your vision?

(If not, identify areas or ways to improve alignment)

What is your research impact identity?

Strategic Assessment

Tools and tips to support your strategic plans

Hierarchy of planning your time

When will you do it?

Is the action **urgent**?

Prioritize (is it important??) and define actions (project planning)

Define YOUR big picture goals and outcomes (**strategic planning**)

Project management: tools and approach

- Structure projects with **tools** and with a **framework**

- Your **team** role (as leader) is to triage priorities and schedule next steps working within **constraints**

Time (schedule)

Quality

Scope

Budget (resources)
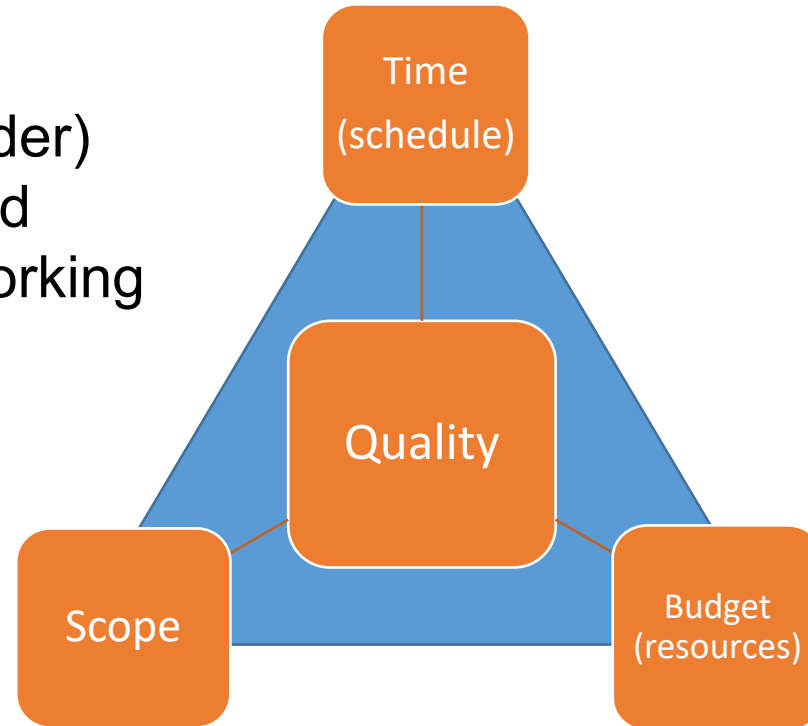
"People + Process = Success"
Lead, engage, inspire, tap into team potential

Project management is balancing 3 constraints

Scope (the fun part!)

Project scope statement

- PLANNING IS WORTH IT **Clearly** **define** scope (goals, deliverables).

- What tasks are necessary to achieve the project goals?

- Controlling scope is critical!! **AVOID "Scope creep"**

Time (scheduling and tracking)

Software/spreadsheet
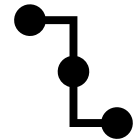
- Identify all tasks/subtasks

- Schedule dates of work

- Organize tasks in sequence – look for CONTINGENCIES

- Consider resources (people hours, access to tools, etc. in your plan)
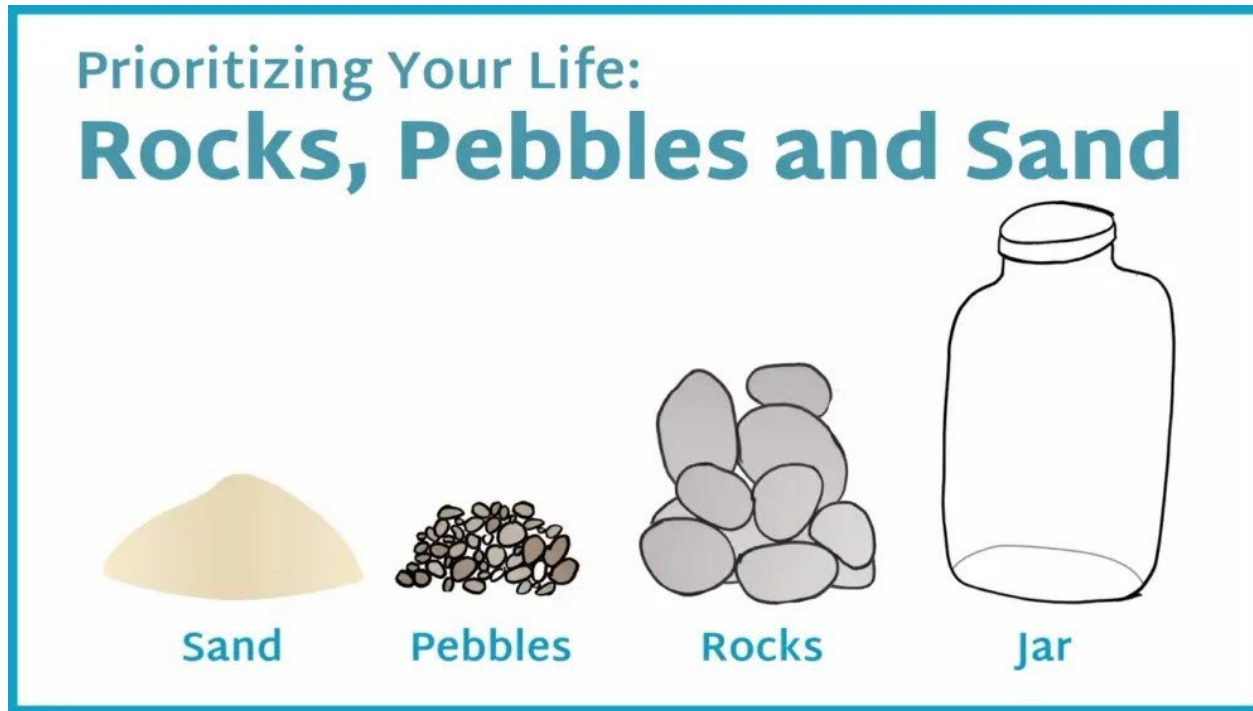
- Build in a **buffer**!

Budget / Resources

Budgeting spreadsheet

- People hours

- Materials

- Fixed vs. variable costs

- Use vendor bids, previous work to estimate

- Do you have resources to meet your goals?

Schedule the big picture stuff.
Your calendar isn't open unless you make it so.
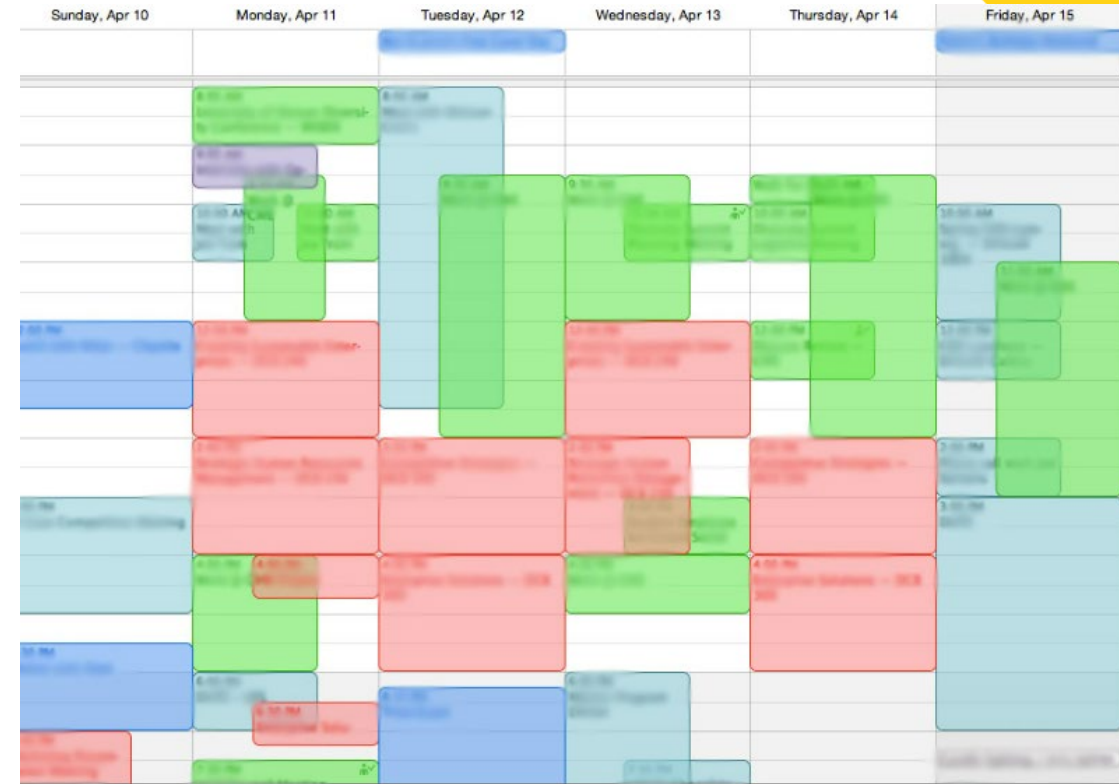
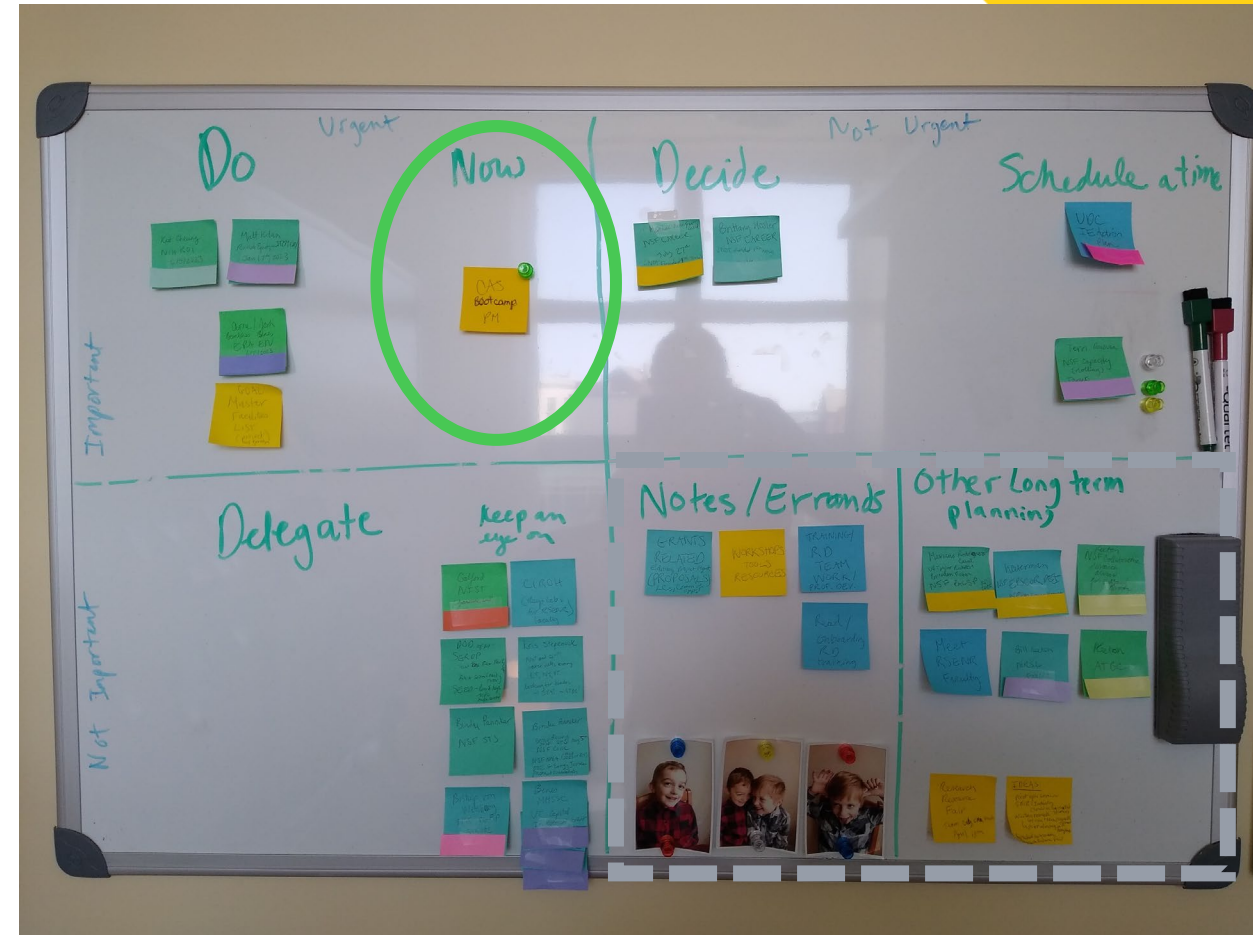Book: "Time to Write" by Kelly L. Stone

What's the "big stuff"? Quarterly reviews and planning for these if part of a group, larger blocks for creative work like writing, submitting proposals, time to have a thought…!

The Eisenhower Decision Matrix

	Urgent	Not Urgent
Important	**Do** *Do it now.*	**Decide** *Schedule a time to do it*
Not Important	**Delegate** *Who can do it for you?*	**Delete** *Elminate it*

Example: my office – it doesn't have to be fancy!

Teams "Tasks by Planner and To Do" (Kanban)

Visualize workflow with cards to show status, easy to update, sharable

Getting Things Done
by David Allen – main points

Your brain is for having ideas, **not** for holding them.

Writing things down frees up your mind.

Having a single system for keeping track of stuff allows you to relax and is worth the effort invested in doing so.

1) Capture – write down ideas/to-dos/projects

2) Process – turn into actions

3) Review – prioritize, schedule goals and actions (schedule weekly reviews)

Summary (8min) of Getting Things Done main points: https://www.youtube.com/watch?v=4aD8WG49PY4

Personal time management tools and resources

Should it be done at all?
- "Four Thousand Weeks" (book/perspective: Oliver Burkeman)
- Set goals and define success with Kellogg's Logic Model (inputs, activities, outputs, outcomes framework)
- Eisenhower Decision Matrix (concept/prioritize) to use – whiteboard & post-its

If yes, it should be done: improve productivity, work efficiently:
- "Eat that Frog" (book: Brian Tracy)
- "Getting Things Done" (book: David Allen)
- Pomodoro Technique (concept) to use - set timers
- Kanban Board (concept) to use Teams app, Trello

Search for apps

Tasks by
Planner and

*UVM library links for books **in the notes** (links go to goodreads)

Best practices

Tech "solutions" are only as good as the time and effort you put into them!

- Figure out what works for you

- Simplify as much as you can

- Use tools consistently to make organization a habit

Use shared tools to create consistent structure for your team

Laziness does not exist: Tips to manage overwhelm

Get clear to get "unstuck"	Actions to address "stuckness"
Is it clear what needs to be done?	Define action and desired outcome. *("Clarity is Kindness" if you're in charge!)*
Are you distracted by more urgent things?	Set priorities and reserve time
~~Does the task need to be done at all?~~	Decide - is it important? No? Don't do it!
Are emotions stopping you?	E.g., anxiety of attempts not being "good enough". *Creativity is messy and embarrassing*, get curious and try taking on just a little piece. You've got this.
If it's someone else that is procrastinating, do they have the tools and skills to be successful?	Have you cultivated a culture where it is okay to fail, learn, and try again? Do you need to train or mentor for success?

Breakout Session 3. (10 minutes)
Developing your Plan

What are the "rocks" (e.g., tangible outcomes) that you need for your strategic plan?

What are your initial steps and milestones?

What barriers to progress can you anticipate?

UVM resources to support your strategic plan

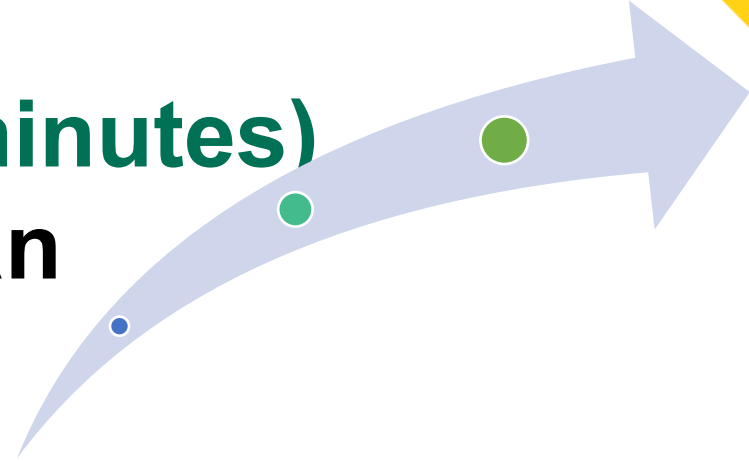# Research Development   https://www.uvm.edu/ovpr/resdev

Research Development

We believe in ideas, and we want to hear yours.

Explore ✕

OFFICE OF THE VICE PRESIDENT FOR RESEARCH (OVPR) / RESEARCH DEVELOPMENT

| Research Development Home |
| Grant Writing Support |
| Complex Project Management |
| Finding Funding   + |
| Limited Submissions |
| Ongoing Programs |
| Strategic Planning |
| Research Impacts |
| Resource Library |
| Contact Us |

Research Development offers a suite of services to assist scholars in their pursuit of extramural funding. Our team provides support during the grant development process to help proposals reach their full potential and conveys skills and experience to the UVM community to create highly competitive proposals.

UVM Research Development Services

Request support services on our website: https://www.uvm.edu/ovpr/resdev

1:1 Grant writing and editing support

Project management services for large, complex proposals

Consults

- Finding funding consults

- Strategic planning and RFA fit consults

- Research Impact consults (https://www.uvm.edu/ovpr/research-impacts)

Self-service checklists and templates (via the *Resource Library* on our website)

Strategic resources: Lewis-Burke Associates

- Lewis-Burke Associates is a government relations firm working with UVM
- Advise on federal programming trends, federal agency fit, and matching you with profile-raising opportunities
- *No cost* to faculty

https://www.uvm.edu/ovpr/resdev/strategic-planning

Strategic planning to position faculty for federal research funding and leadership opportunities.

LEWIS–BURKE
A S S O C I A T E S LLC

Lewis-Burke Associates keeps UVM up-to-date on national research interests and trends, omnibus spending changes, new programs, agency and government-wide initiatives, appropriations and authorization legislation, and profile-raising opportunities. They also work closely with the U.S. Congress, the U.S. Executive Branch, thought leaders, and global organizations to build and leverage relationships that advance the policy and funding objectives of UVM.

You can read more about Lewis-Burke Associates on their website.

VISIT LEWIS-BURKE ASSOCIATES

Lewis-Burke Associates provides UVM with a steady stream of analyses and highlights funding opportunities that may
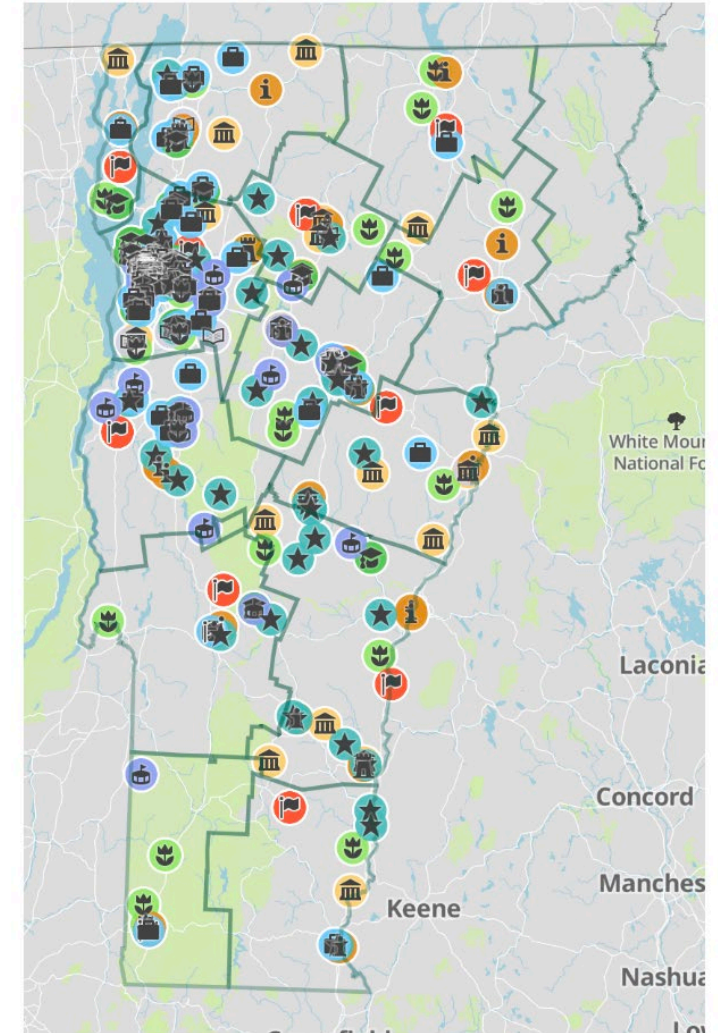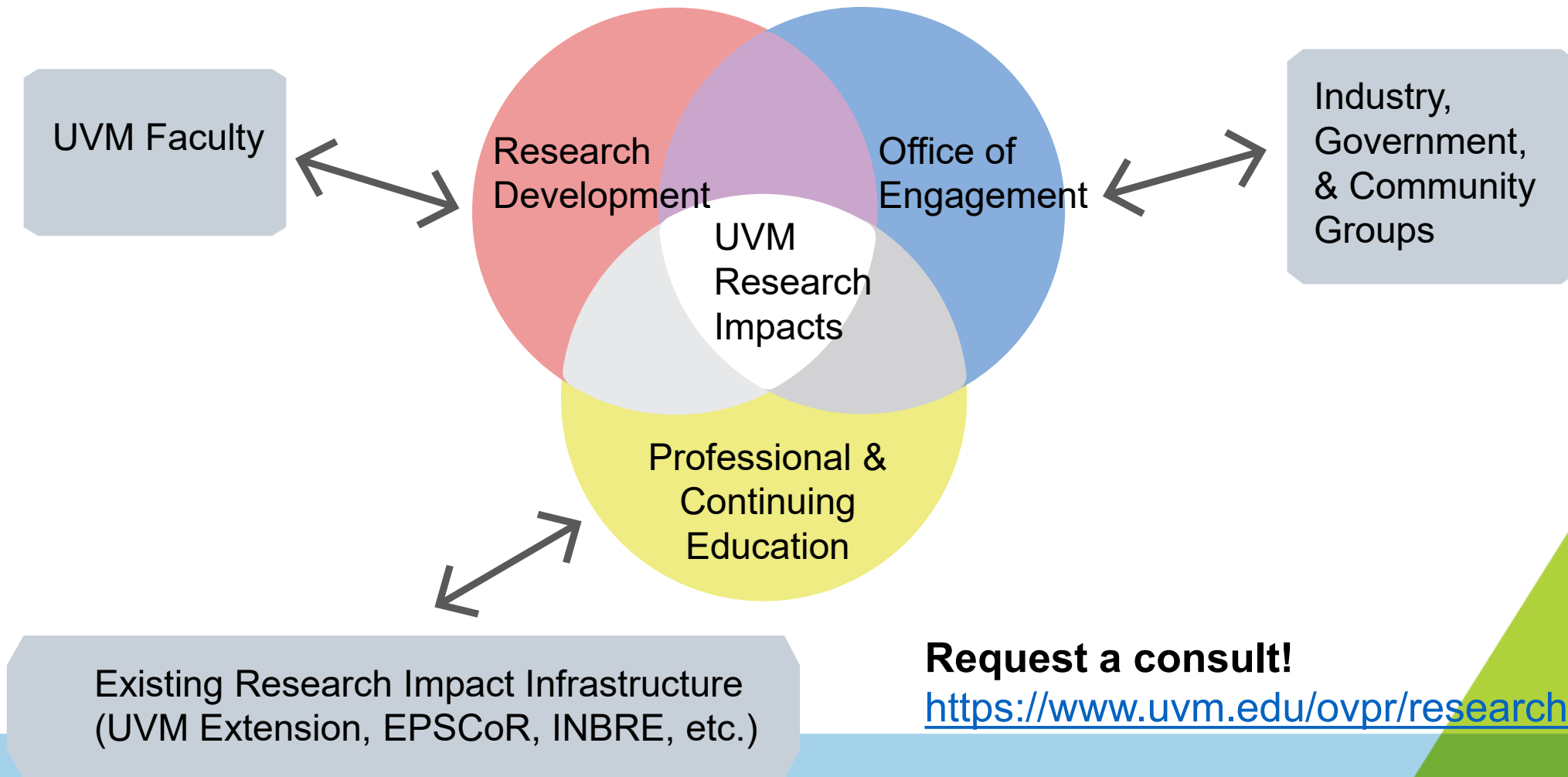
Strategic resources: UVM Office of Engagement

- UVM's "front door" for private, public and non-profit entities and communities looking to access UVM's strengths and capabilities

- Find collaborators inside and outside UVM

www.uvm.edu/engagement

UVM Engagement Map

Strategic resources: UVM Research Impacts

UVM Faculty

Research Development

Office of Engagement

UVM Research Impacts

Professional & Continuing Education

Industry, Government, & Community Groups

Existing Research Impact Infrastructure (UVM Extension, EPSCoR, INBRE, etc.)

Request a consult!
https://www.uvm.edu/ovpr/research-impacts

Wrap up: Tips for Keeping Your Strategic Plan Alive

- Keep it in front of you

- Revisit and revise periodically (Annually? Quarterly?)

- Allow your plan to be **dynamic** – plan with flexibility

- UVM resources are here to help!

Now it's your turn!

Homework: Put time on your calendar **now**

for strategic planning!

Challenge: Connect with one or more of your

peers from this session for accountability.

Thank you!
for additional questions:

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Jessica Waite, PhD
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Research Development
jwaite@uvm.edu

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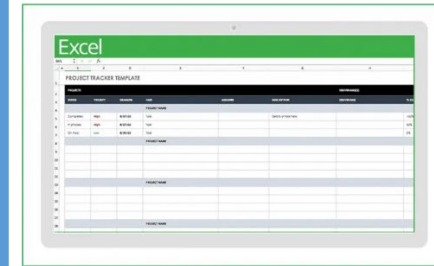
Email: resdev@uvm.edu

Project management tools for complex projects

Useful for **contingent** tasks: one update changes linked dates too –> watch out for these "critical pathways"

Free templates: https://www.smartsheet.com/top-project-management-excel-templates

SOFTWARE

- **Microsoft Project;** paid, can request UVM license: https://project.microsoft.com/uvmoffice.onmicrosoft.com/en-US

- **Smartsheet;** basic is free: https://www.smartsheet.com/

- **Project Libre;** all free: https://www.projectlibre.com/

- **Asana;** basic is free: https://asana.com/

- **Teams has a "Tasks by Planner and To Do" app**

Project Tracker Template

Manage, track, and update all project details, and gain insight into how the project is progressing against your **project plan** with this project tracker template. Document project details, like tasks, status, priority, deadlines, budget, resource hours and more within the template.

⬇ Download Excel Project Tracker
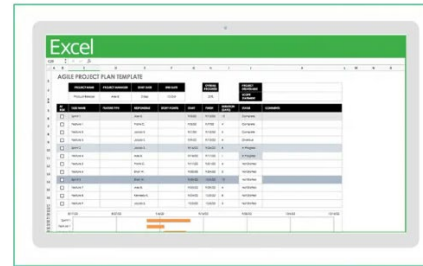
Agile Project Plan Template

Visually manage project schedules, sprints, and task durations, track agile requirements, establish timelines, and organize resources to ensure all sprints of your Agile project stay on track with this Agile project plan template.

⬇ Download Excel Agile Project Plan Template

Tasks by Planner and To Do   About ✕

Tasks makes it easy to stay organized across all your Planner and To Do tasks. Create, assign, and track tasks individually or collaboratively with your team, and see everything come together in one place. Learn more

◉ Create a new plan

Tab name

Tasks

Developing a Strategic Plan to Achieve
Your Research, Scholarship, and Creative Goals

Define your long-term research/scholarly vision

- What do you want to accomplish in the next 5 - 10 years (or more)?

- What is your mission or purpose?

- What difference or impact do you want to make?

- What critical issue(s) do you want to respond to?

- What should your priorities be? Where should you allocate time and resources?

### Breakout Session 1: Long-term Goals
- **Where do you want to be as a researcher/scholar in 5 years?**

- **Where/how do you want to make an impact?**

- **What does success look like to you?**

Strategic Assessment: Where are you now?
- Is it an area you are still passionate and enthusiastic about?

- Do your current activities and plans align with your values?

- Do you have a strong publication record or scholarly output that will support your chosen area of research/scholarship?

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Breakout Session 2: Strategic Assessment of Your Current State

- **Does your current research/scholarship align with your vision?**
  - *(If not, identify areas or ways to improve alignment)*

- **What is your research impact identity?**
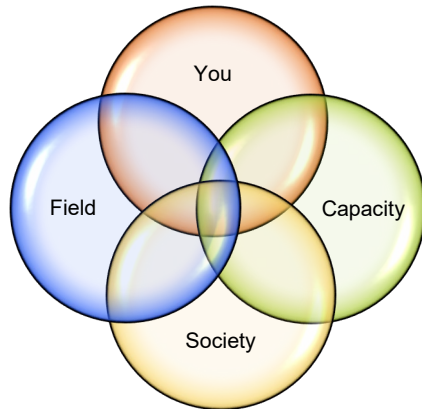
Breakout Session 3: Developing Your Next Steps

- **What are the rocks (e.g., tangible outcomes) that you need for your strategic plan?**

- **What are your initial steps and milestones?**

- **What barriers to progress can you anticipate?**