"The First-Year Faculty Experience of Research and Scholarship at UVM"

Presenters:

Jessica "Jessi" Waite, Grant Proposal Developer - RSENR, Office of the Vice President for Research (OVPR)

Sarah Wold, Complex Grant Proposal Developer - LCOM, Office of the Vice President for Research (OVPR)

Moderator:

Nicole Conroy, Kroepsch-Maurice Provost's Fellow for Faculty Affairs; Associate Professor of Human Development and Family Science, College of Education and Social Services

Upcoming FYFE Sessions

Fridays from 12-1:30 on Teams

December 11: FYFE #4 – Grant Writing at UVM

January 22: FYFE #5 – Addressing Student Concerns at UVM

February 12: FYFE #6 – Preparation for First Reappointment

University of Vermont

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

Jessica Waite, PhD
RSENR Grant Proposal Developer
UVM Research Development

Sarah Wold, PhD
LCOM Complex Proposal Developer
UVM Research Development

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Housekeeping & Ground Rules

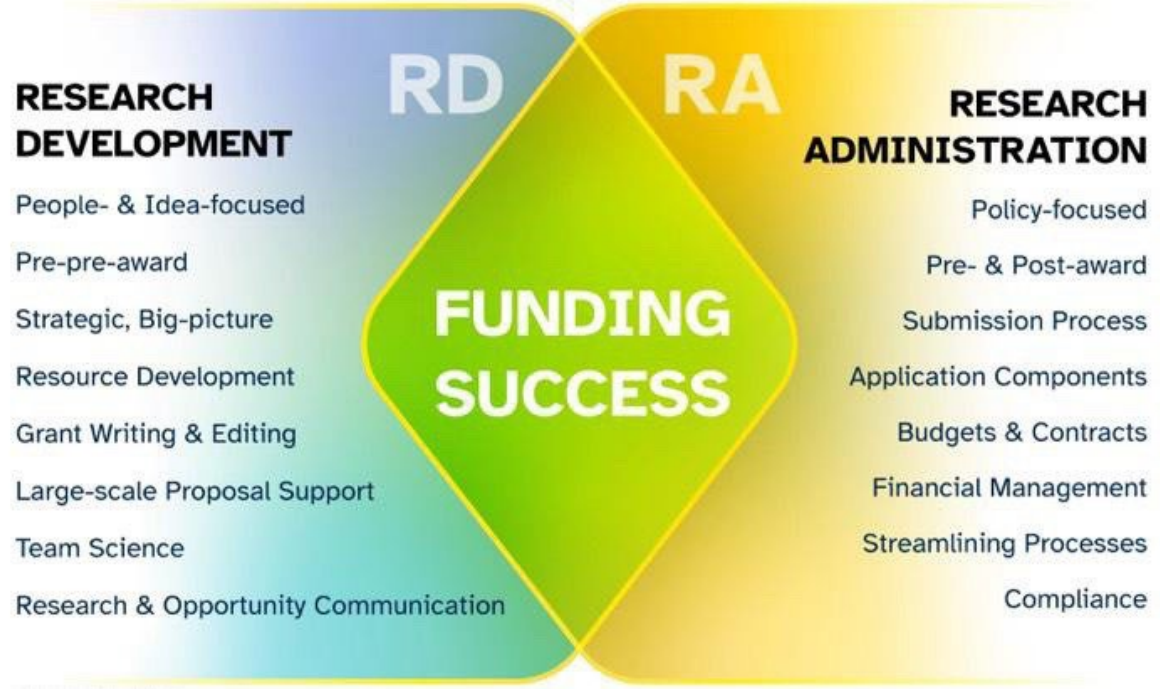
We affirm all aspects of identity

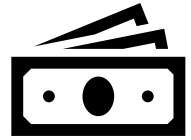
- Neurotypes, gender, sexual orientations, race, disability, ethnicity, and all other forms of diversity

All forms of participation are okay

- Speak, gesture, emoticons/reactions, mix/match
- Walk, move around, fidget, eat/snack, take breaks









CFR

CORPORATE & FOUNDATION RELATIONS

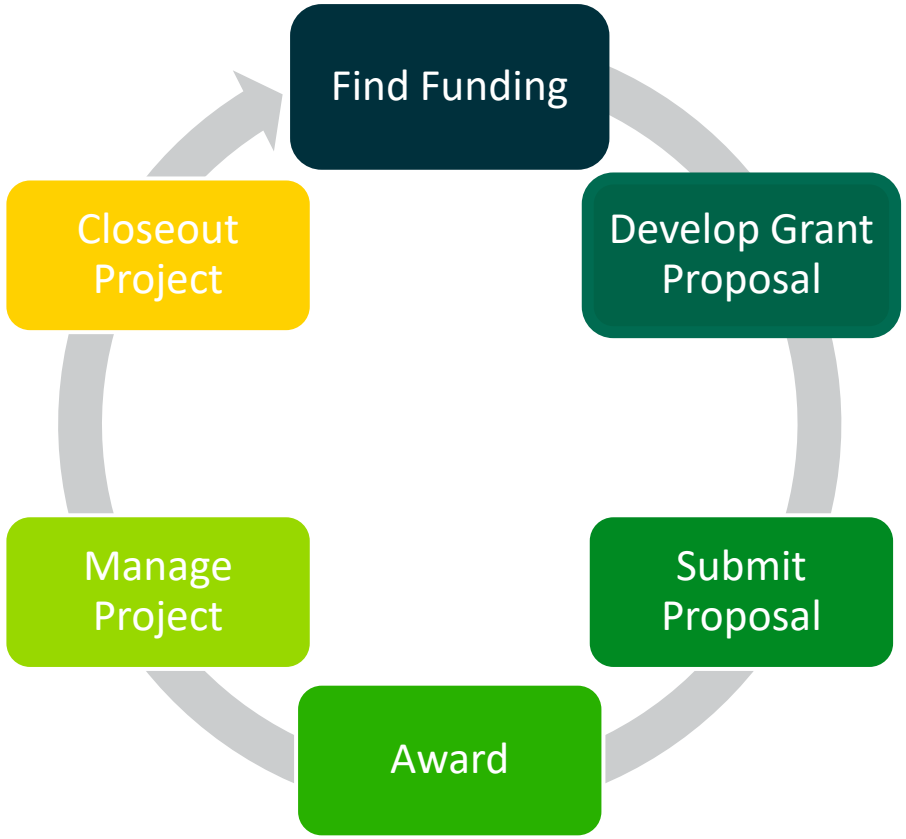
Relationship-based
Partner/Sponsor Prospecting
Alignment & Pitch Strategy
Relationship Management
Stewardship

What Support Does Research Development Offer?

REQUIRED

Sponsored Projects Administration





OPTIONAL

Research Development



- Share Funding Opportunities
- Manage Limited Competition Process
- Provide Grant Writing/ Development Support
- Offer Grant Writing Resources, Programs, Tools

Communication of Funding Opportunities

- Targeted outreach to individual PIs, and leadership
- Pivot-RP database
  - Consult, assistance with creating saved searches
- Weekly Limited Competitions Newsletter

Grant Proposal Development Support

- **Grant proposal review and grantsmanship critique**
  - Annotated feedback and suggestions
  - Review for responsiveness to RFA, and/or reviewer critiques
- **Grant proposal writing assistance and editing**
  - Substantive editing of draft text
  - Editing to improve clarity and flow, formatting and presentation
  - Assist with drafting non-technical proposal components
- **Project Management for proposal preparation – *Limited service***

Research Development Website

https://www.uvm.edu/ovpr/resdev

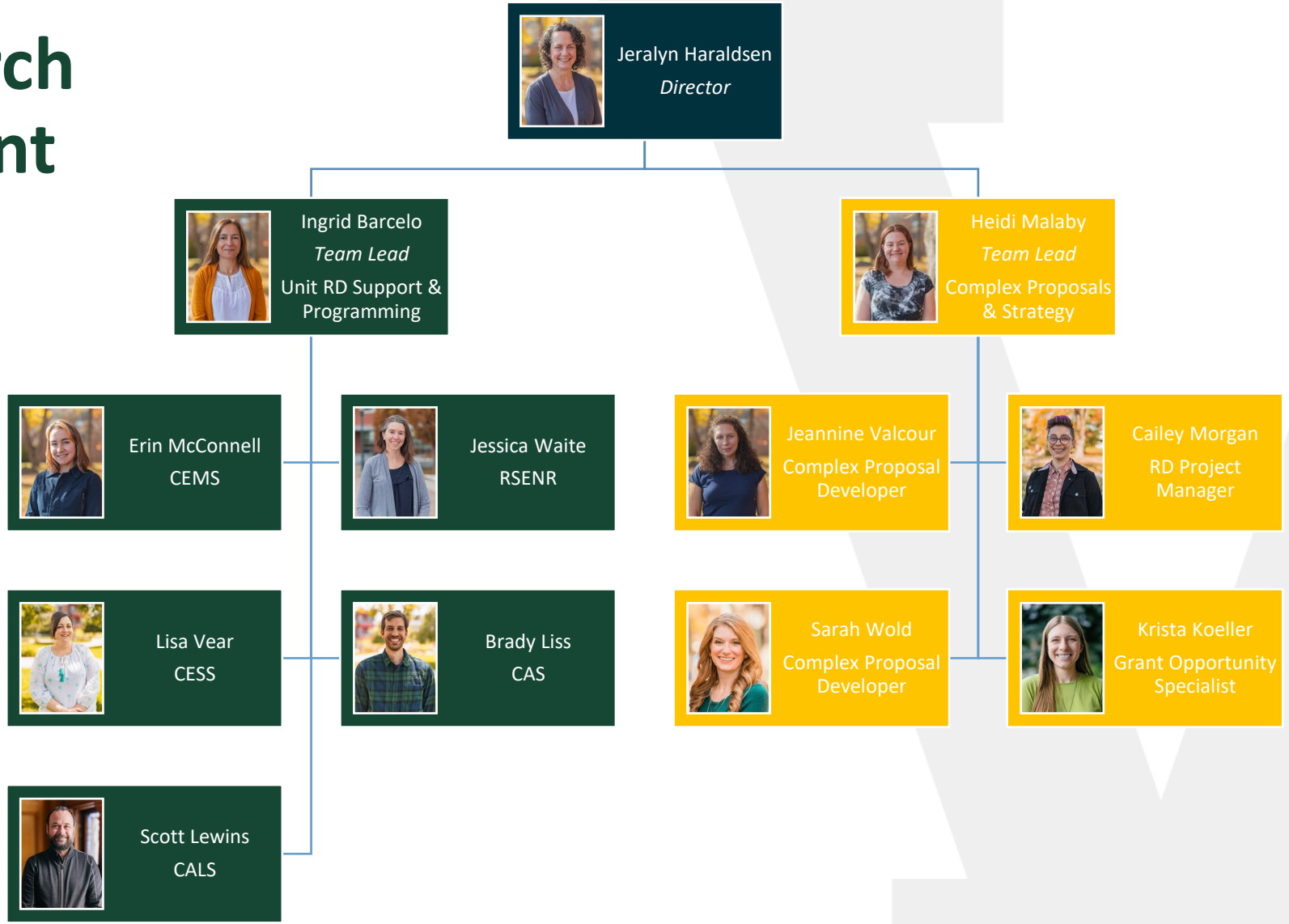
Grant Writing Resources, Programs, Tools

UVM Specific Resources

Checklists and Templates (USDA, NSF, NIH)

Types of supports and services

UVM Research Development Team



Transitions can be Overwhelming

Moving to a new campus, new city

Setting up your office, laboratory, studio space

New colleagues

Balancing Teaching/Service/Scholarship

Climate of uncertainty

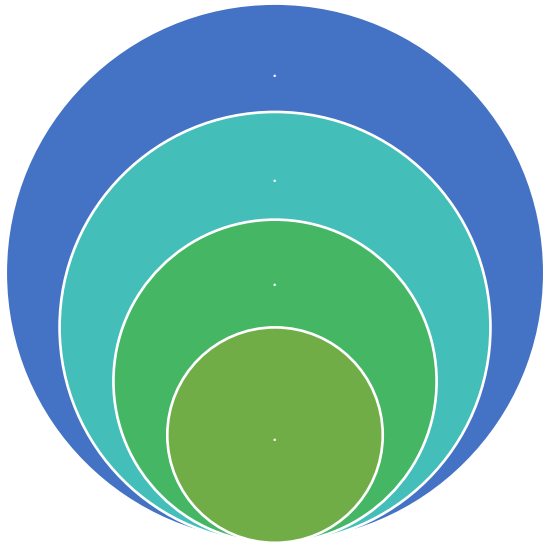
Prioritize creating a strategic plan for your research, scholarship, or creative activity. It ultimately helps to decrease the overwhelm and increase efficiency.

What is Strategic Planning?

Where are you now?
(Current State)

Strategic Assessment

How will you get there?
(Strategic Plan)



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

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Why Strategic Planning?

Takes you outside of the day-to-day activities, allows 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 impact

Through the lens of a research program:

- Managing the unpredictability of the creative process
- Building a programmatic identity
- Being agile and maintaining a diverse funding strategy

Why Invest Your Time in Planning?

Planning *is* "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!

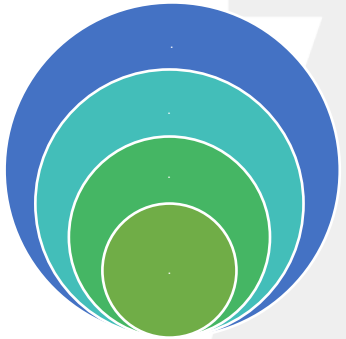
Scaffold of a Strategic Plan

- Define your long-term research/scholarly vision
    - What are your ***values***?
- Self-evaluation: strengths and weaknesses
- Define short-, mid- and long-term goals to achieve vision
- Implementation
- Regular review, revision, realignment
- Understand expectations / metrics for how your success will be measured

https://www.uvm.edu/provost/reappointment-promotion-and-tenure-rpt

Define Long-term Research/Scholarly Vision

- 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 might your priorities be (~5 years)?
- Where should you allocate time and resources?



Where do you want to be?
(Future State)

Consider writing your own mission statement
https://andyandrews.com/personal-mission-statement/

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 Expectations & Metrics

- Promotion and tenure guidelines
- Norms within your research / scholarly / creative community

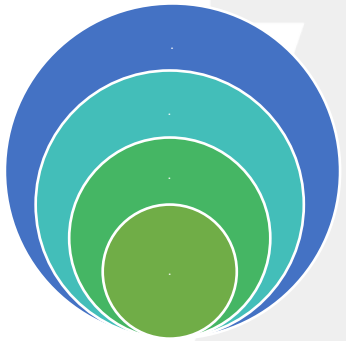
Success is not a destination; it's a process.

Articulating Your 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?



Where do you want to be?
(Future State)

Assessing Your Research / Scholarship / Creative Activity

- What are you most passionate and enthusiastic about?
- How 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?
- What federal agencies or foundations are likely to fund your work?

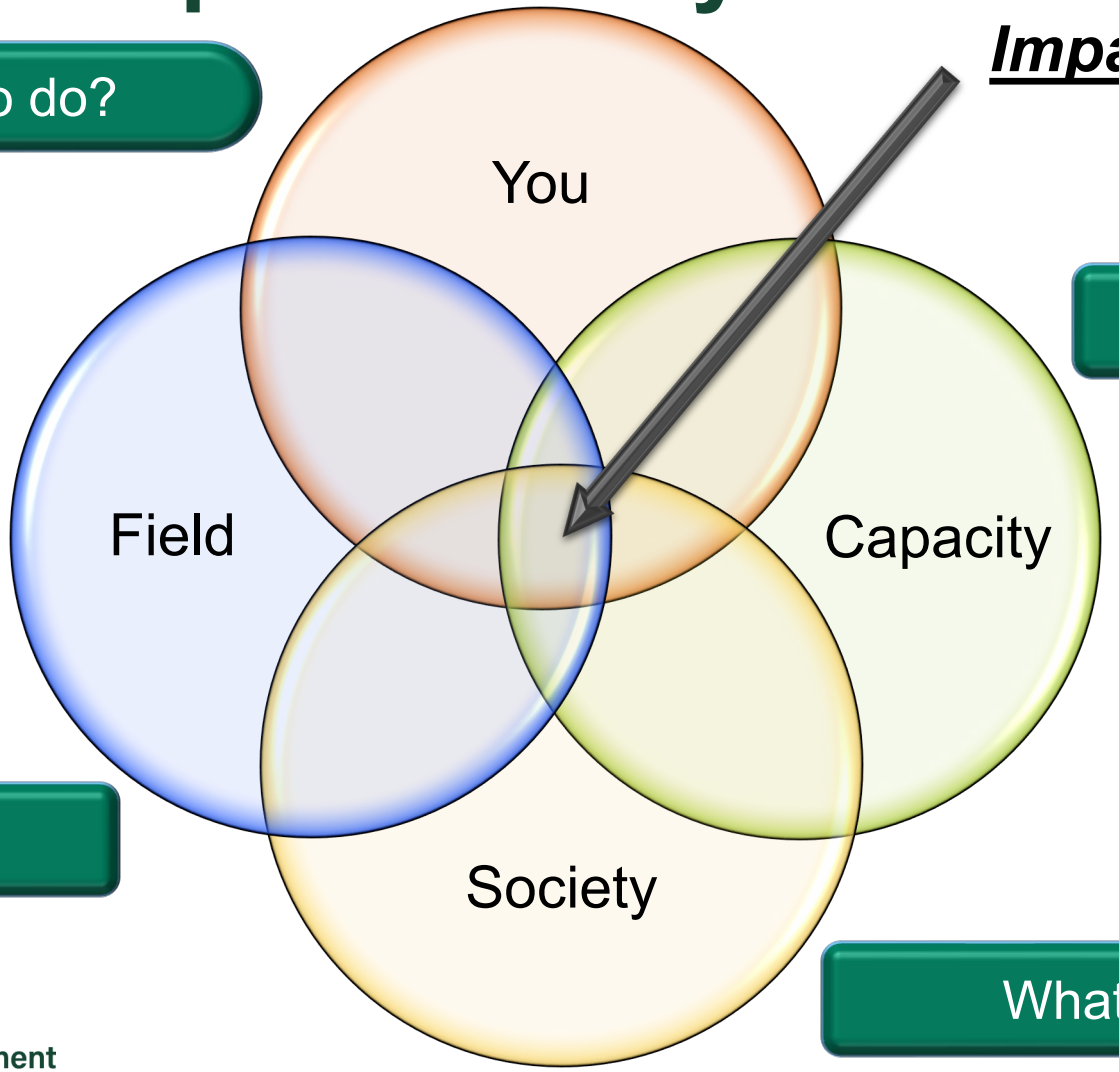


(Current State)

Defining your Impact Identity

What I WANT to do?

Impact sweet spot!



What I SHOULD Do?

What I CAN do?

What is needed?

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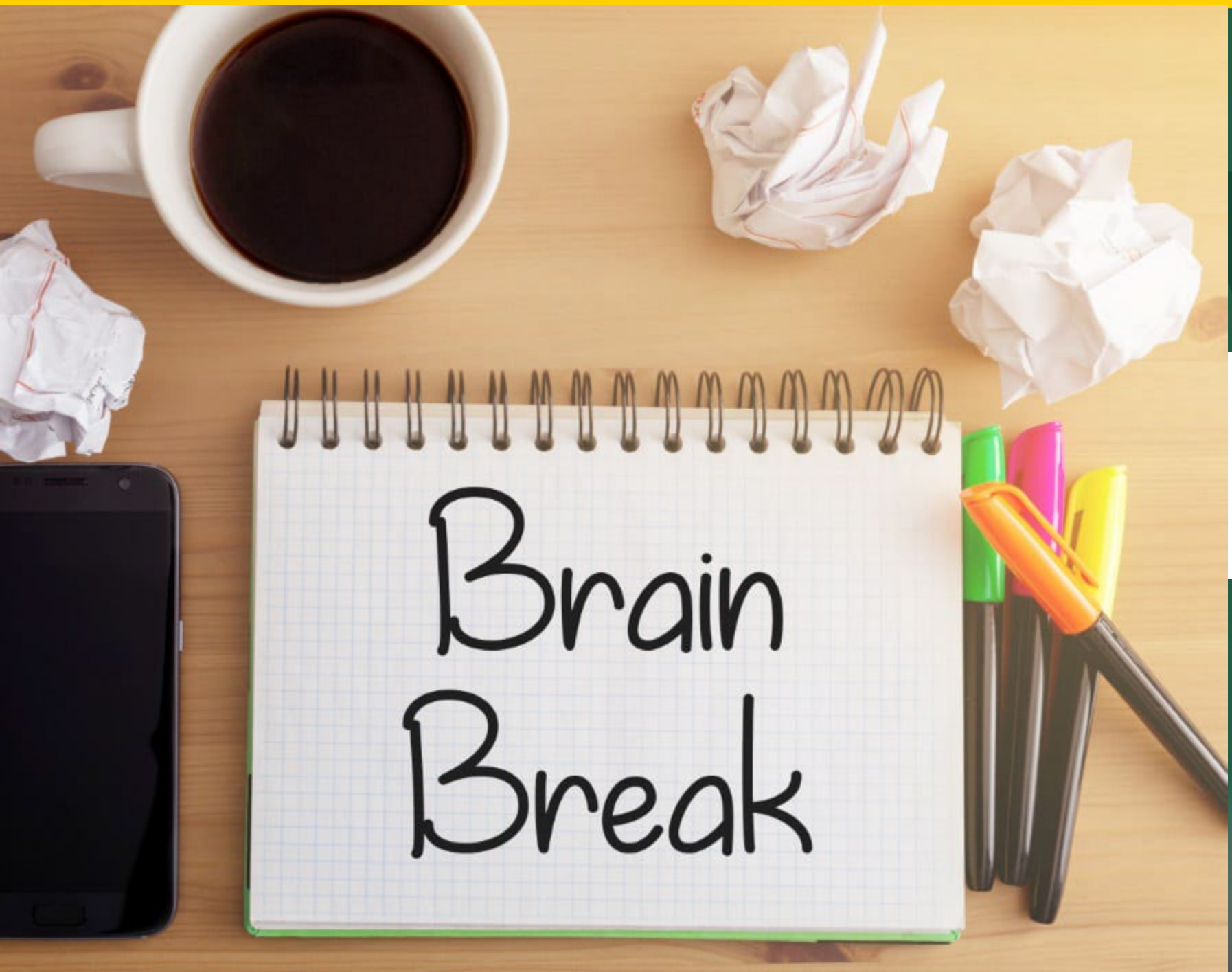
Charting Your Course Forward



(Current State)

How does your current research/scholarship support your vision?
(If not, what are ways to improve alignment)

What are you doing now that will support your future research impact identity?



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Tools and Tips to Support Your Strategic Plans



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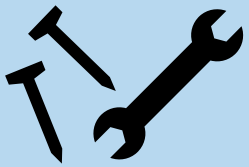
Laziness Does Not Exist: Tips to Manage Overwhelm

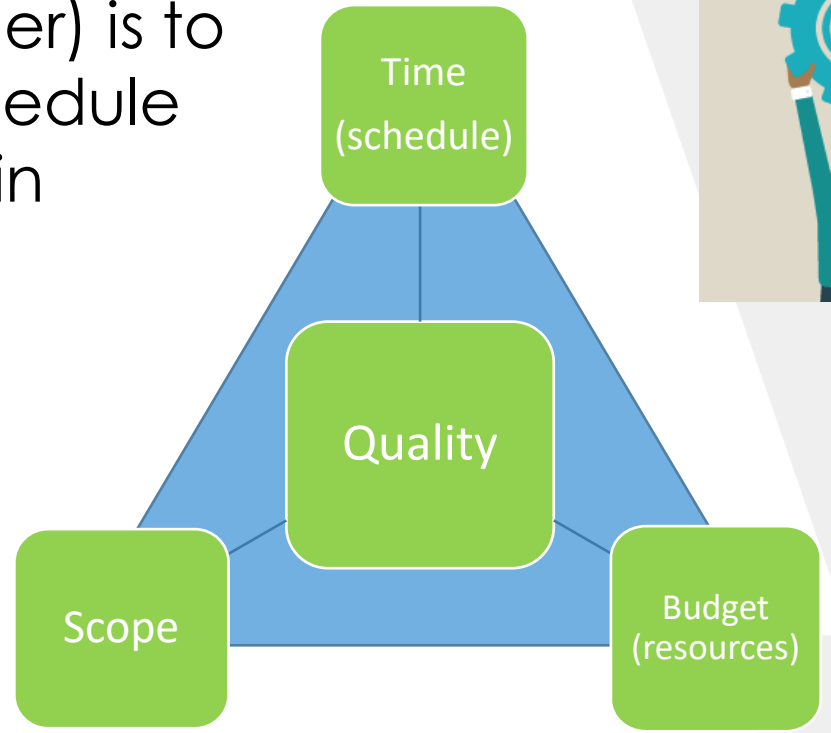
Get clear to get "unstuck"	***Actions to address "stuckness"***
Is it clear what needs to be done? 	Define action and desired outcome. *("Clarity is Kindness" if you're in charge!)* 
Are you distracted by more urgent things? 	Set priorities and reserve time 
~~Does the task need to be done at all?~~	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? 

Hierarchy of Planning Your Time



Project Management: Tools and Approach

- Structure projects using **tools** and with a **framework**
- **Your** team role (as leader) is to triage **priorities** and schedule **next steps** working within **constraints**



The "Iron Triangle"

"People + Process = Success"
Lead, engage, inspire, tap into team potential





90% of Project Management Work is Communication



Example Communication Management Plan

Description	Frequency	Method	Audience	Owner
Name of the communication	How often it will happen	Method of communication	Who will receive the communication	Who is responsible
Project team meeting	Daily	Meeting	Project team	Project manager
Stakeholder update	Monthly	Email newsletter	Stakeholders	Project manager
Board meeting	Every two weeks	Meeting	Project board	Project manager
Contribution to department newsletter	Quarterly	Section of newsletter	Wider development	Project manager to deliver to department administration

Project Management: Balancing Three 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?

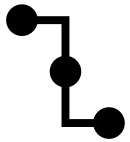


Controlling scope is critical: **AVOID "Scope creep"**

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

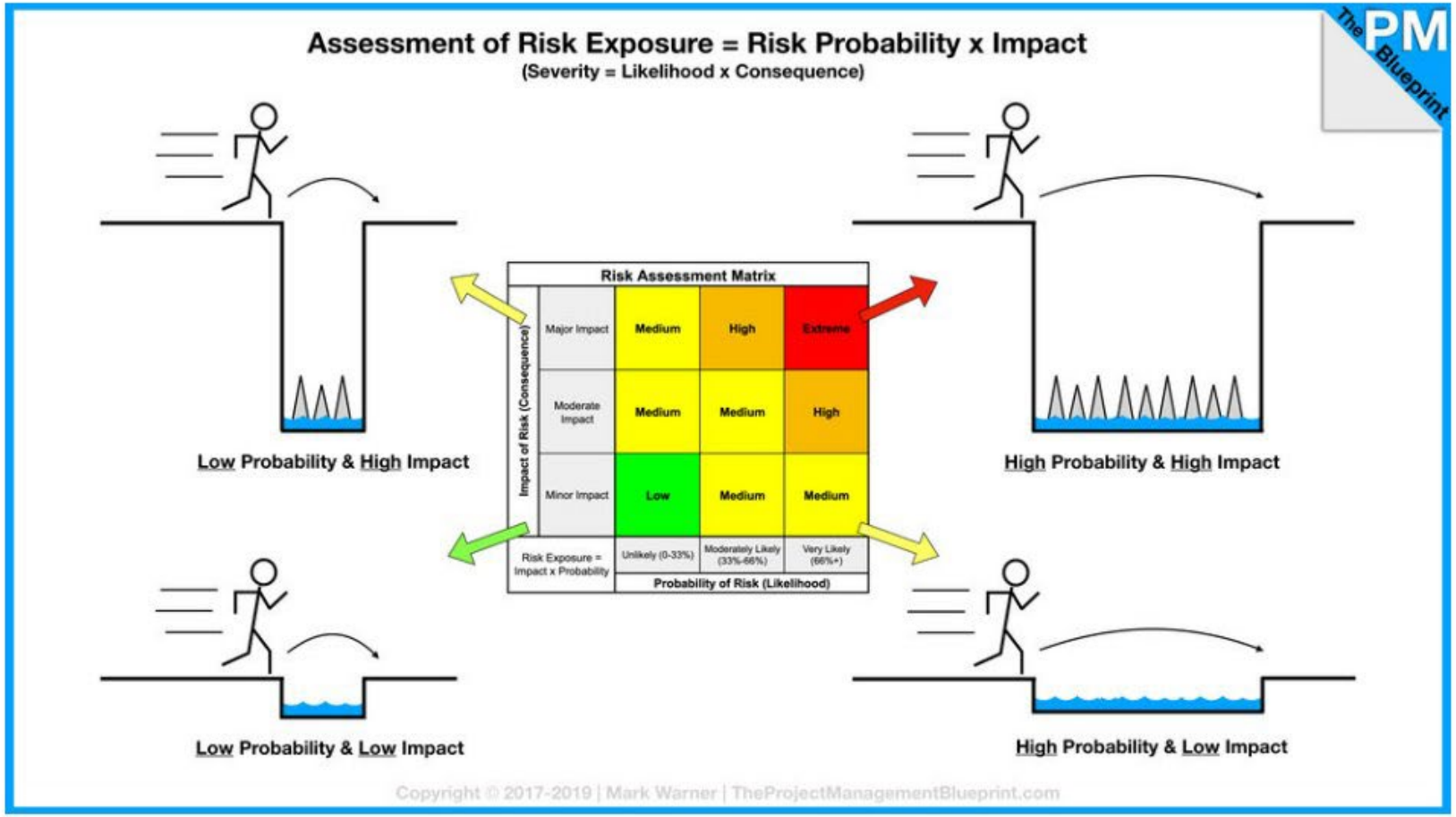
Budgeting spreadsheet





- People hours
- Materials
- Fixed and variable costs
- Estimate using vendor bids, previous work
- Do you have the resources to meet your goals?

Risk Happens: Manage Anticipated (and Unanticipated!) Risks

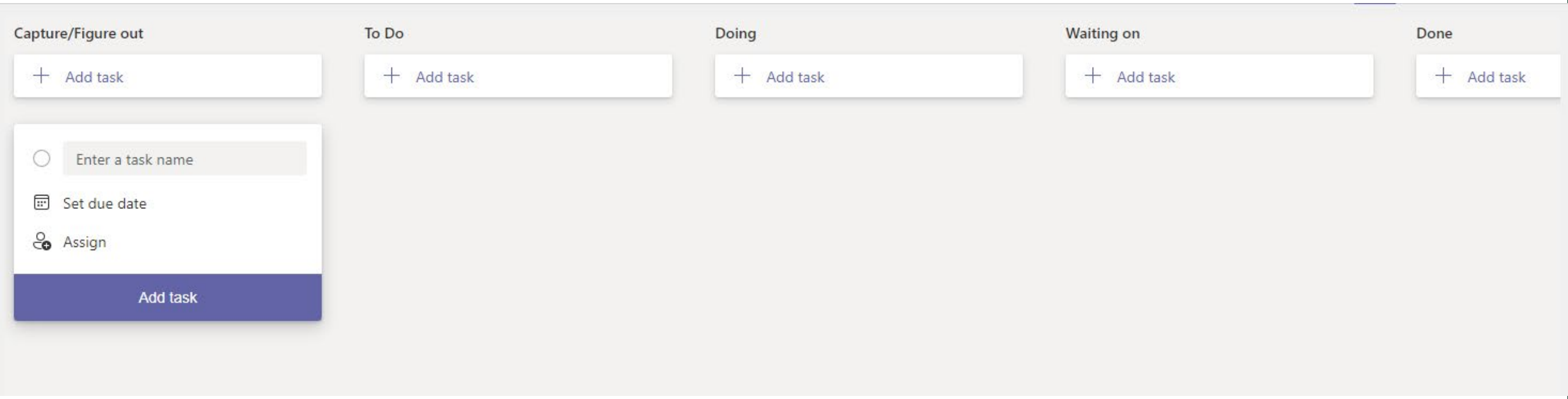


Risk Exposure = Risk Probability x Risk Impact

Source: https://www.theprojectmanagementblueprint.com/blog/risk-management/risk-exposure-equals-probability-times-impact

Teams “Tasks by Planner and To Do” (Kanban Board)

Visualize workflow with cards to show status; easily updated & sharable



https://www.planview.com/resources/guide/introduction-to-kanban/what-is-kanban-board/

The Eisenhower Decision Matrix

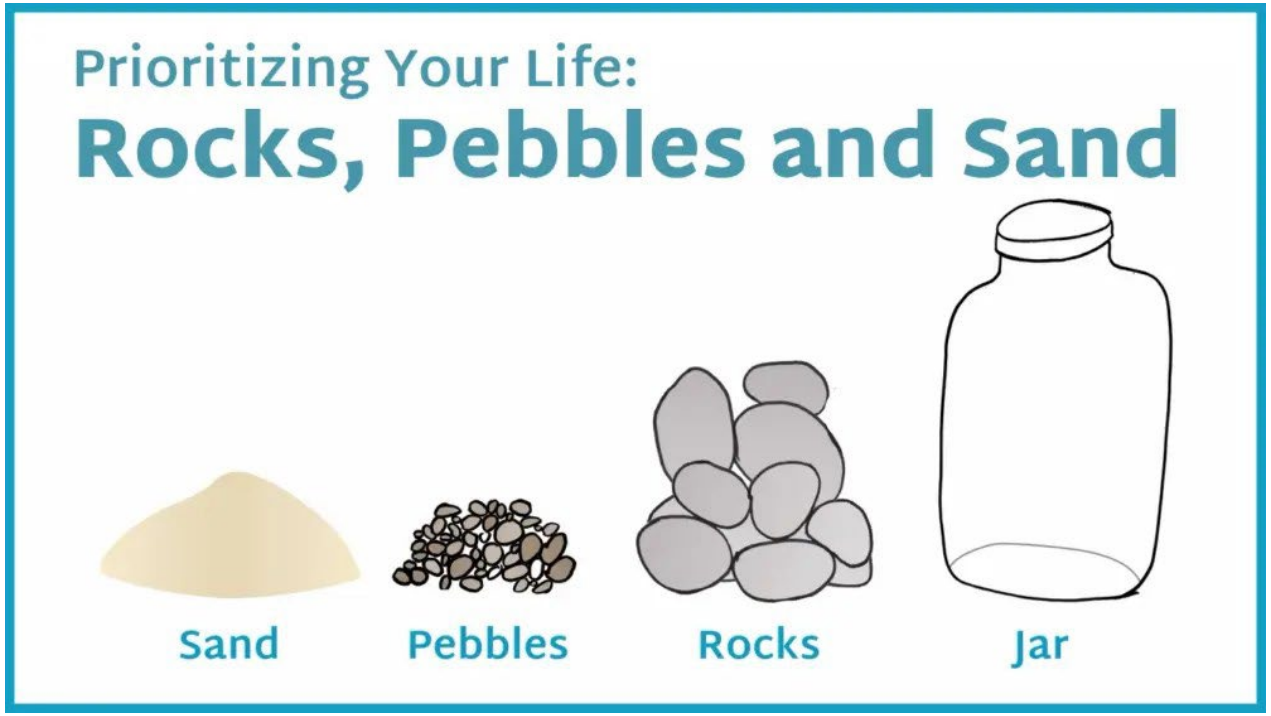
	Urgent	Not Urgent
Important	**Do** *Do it now.*	**Decide** *Schedule a time to do it*
Not Important	**Delegate** *Who can do it for you?*	**Delete** *Elminate it*

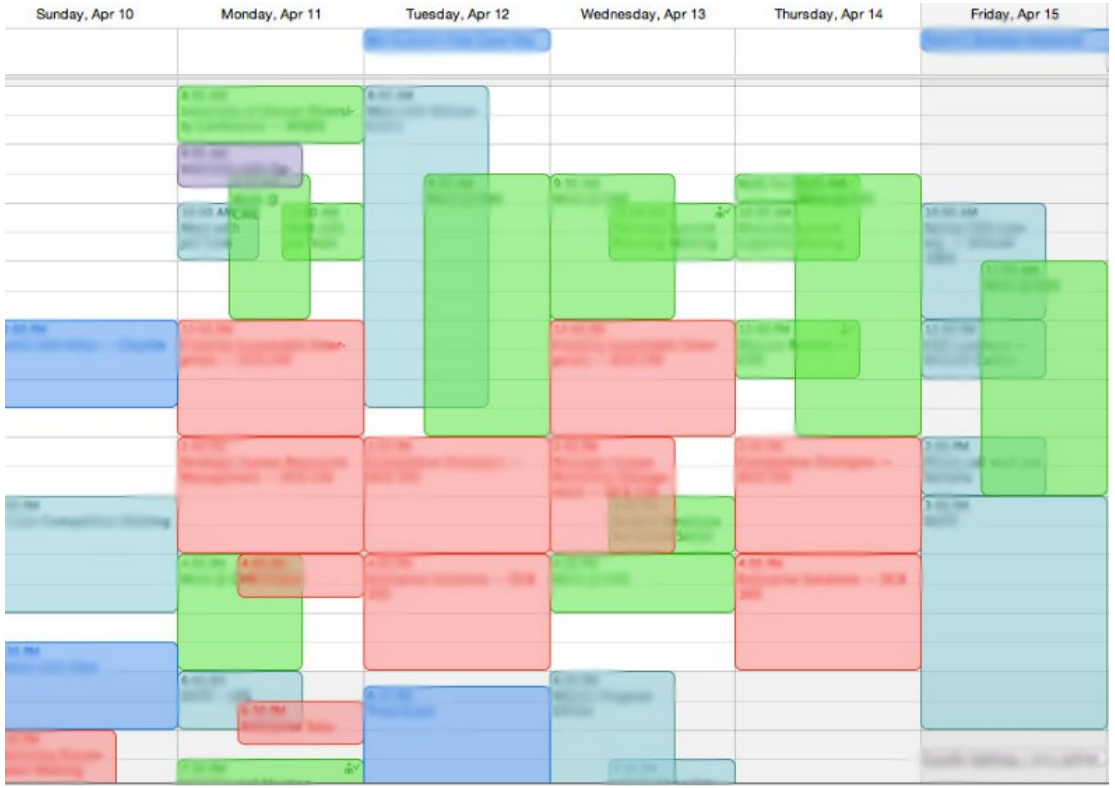
Example: my office – it doesn't have to be fancy!



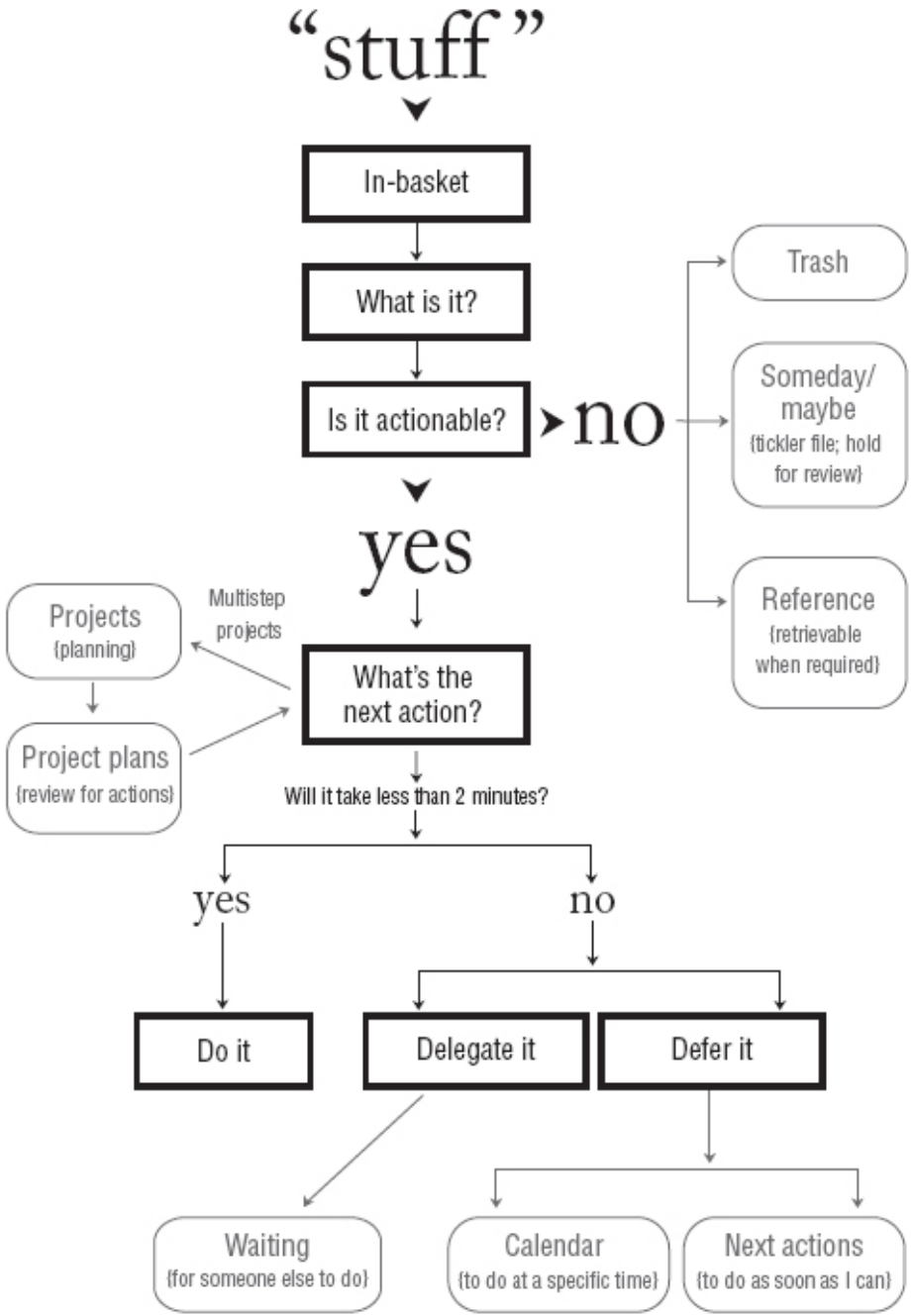
Schedule the Big Stuff

Your calendar isn't open unless you make it so.





What's the "big stuff"? Quarterly reviews, planning these for your teams, larger blocks for creative work like writing papers or proposals, time to think!



Getting Things Done
by David Allen – main points

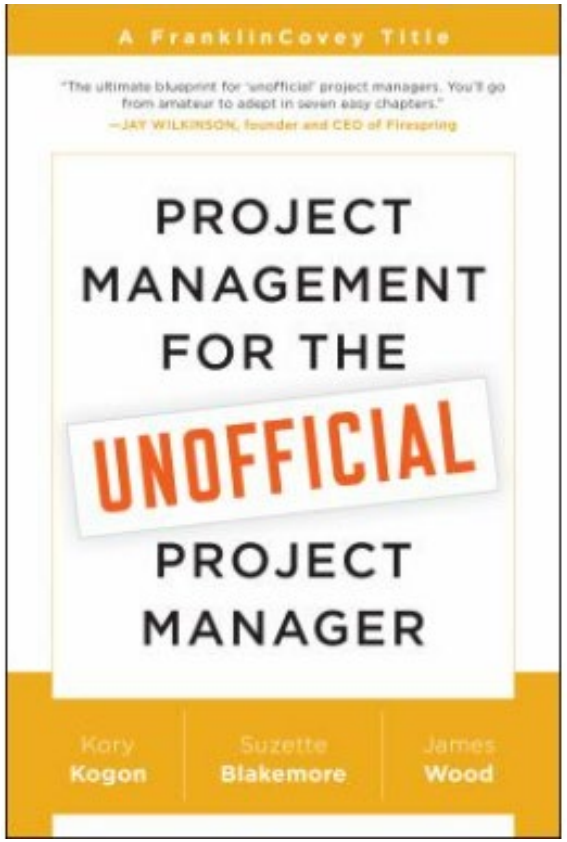
Your brain is for **having** ideas, **not** for **holding** them: Writing things down frees up your mind.

Having a single system for keeping track of stuff allows you to relax and is worth the effort!.

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

*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

Project management tools for complex projects

Useful for **contingent** tasks: one update changes linked dates too

–> watch out for these critical pathways!

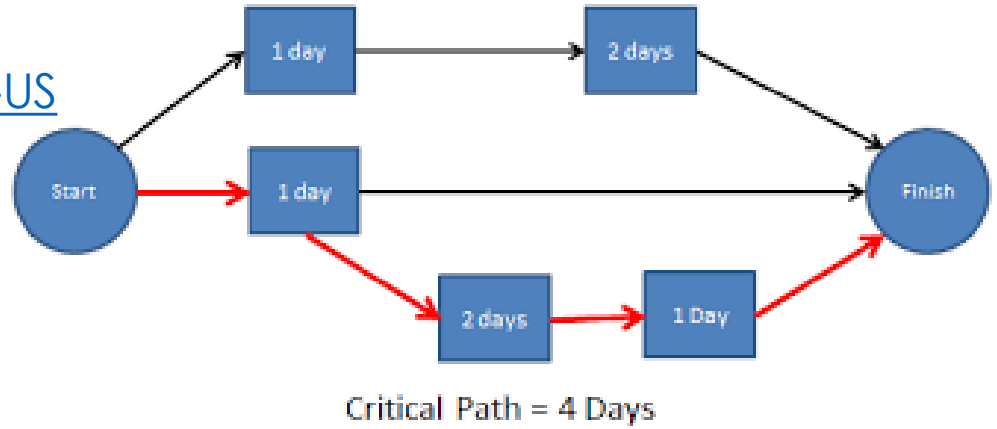
Free templates: https://www.smartsheet.com/top-project-management-excel-templates

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/



Others (paid subscriptions): **Monday.com**, **Jiro**, **Trello**, **ClickUp**, **Todoist**, **Basecamp…**

Basic Project Management: Teams has the **"Tasks by Planner and To Do" app**

Example: Strategically Plan for Funding Opportunities

- What are you competitive for now? **(Assessment)**
  - E.g., some awards are for certain career stages, or have time constraints or submission limits
- If you aren't competitive now, what activities do you need to focus on to become competitive and how would you fund those? **(Strategic Plan → Milestones)**
  - (e.g., preliminary data, publishing, develop collaborations, serve as a reviewer to gain insight)
- Work backwards from your goal timeframe **(Project Planning → Timeline, Calendar)**
- Allow time for resubmission **(Risk Management)**

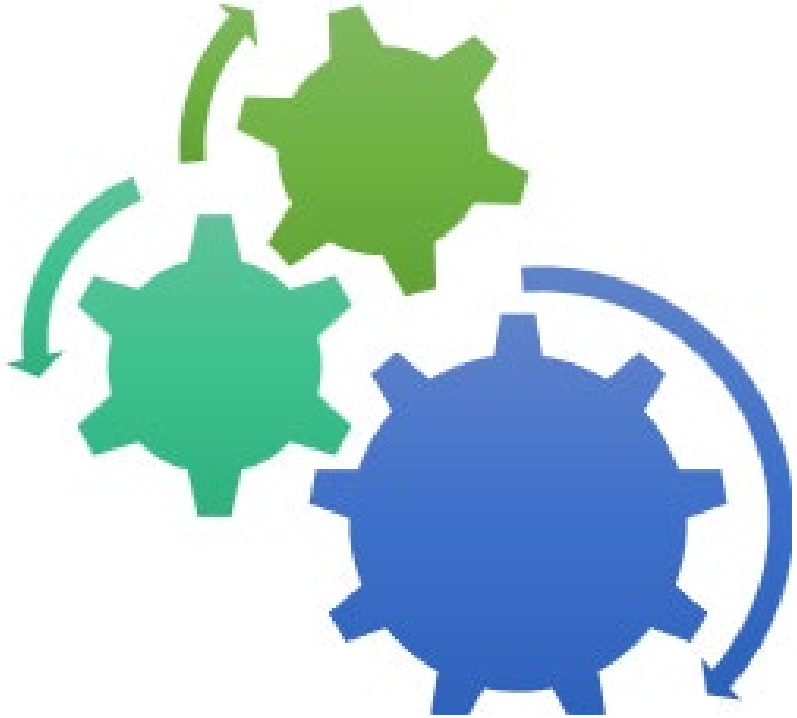
Let's take the next few minutes to discuss:
Developing your Plan

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

What are some examples of **milestones**?

What are some examples of anticipated **barriers** to progress?

UVM resources are available to support your strategic plan



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Research Development Can Support Your Proposal Project Management

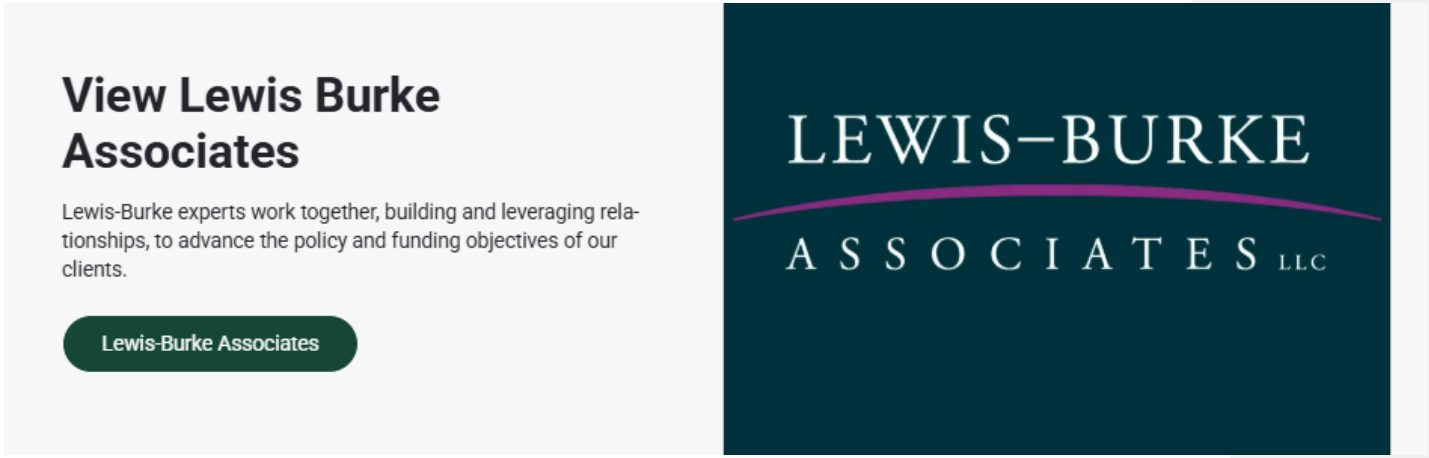
- For early-career faculty and/or those applying to a new agency or pursuing large, complex proposals:
  - Tailored checklists
  - Tailored timelines
  - Custom outlines for the main proposal document
  - Templates for supporting documents

REQUIRED Documents (uploaded as separate PDFs)	Notes
Project Summary	**Limit:** 1 page Must include the following three sections: "Overview", "Intellectual Merit", and "Broader Impacts". ***Note: Failure to put these headings on their own lines will result in an error message when uploading the Project Summary to Research.gov.**
Project Description	**Limit:** 15 pages (unless otherwise specified) • Must contain sections titled "Broader Impacts" and "Results from Prior NSF Support" • Must not contain URLs
References Cited	**No page limit** Must name all authors in each publication (no "et al.")
Budget	*Easiest to build budget directly in UVM Click – interfaces with PeopleSoft for accurate salary information
Budget Justification	**Limit:** 5 pages
Facilities, Equipment and Other Resources	**No page limit** •
Data Management and Sharing Plan	**Limit:** 2 pages *Data management requirements and plans specific to the Directorate, Office, Division, Program, or other NSF unit, relevant to a proposal are available on the NSF website
Biographical Sketches	**No page limit** • Required for all senior/key personnel • Must use SciENcv

Strategic resources: Lewis-Burke Associates

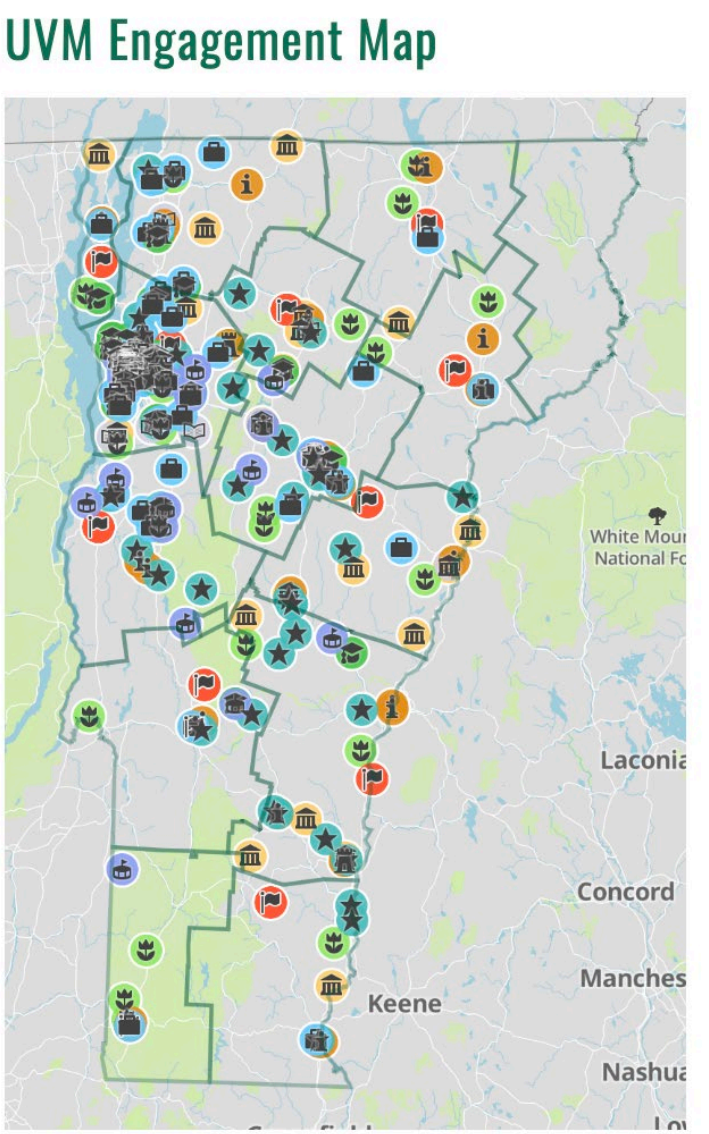
- Lewis-Burke Associates is a government relations firm working with UVM
- Advise on federal programming trends, federal agency fit, and matching you with profile-raising opportunities
- *No cost* to faculty

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



Strategic Resources: UVM Office of Engagement and the Leahy Institute for Rural Partnerships

- Find collaborators inside and outside UVM
- UVM's "front door" for private, public and non-profit entities and communities looking to access UVM's strengths and capabilities www.uvm.edu/engagement
- See also Leahy Institute for Rural Partnerships: https://www.uvm.edu/ruralpartnerships



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 support you!





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