

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

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Research Impacts Hub



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**
  - Video on or off
  - Speak, type in chat box, gesture, emoticons/reactions, mix/match
  - Walk, move around, fidget, eat/snack, take breaks

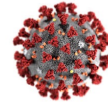
# Research Development

- Communicate funding opportunities
- Manage Limited Competition process
- Provide Grant Proposal Development Support
- Develop Grant Writing Resources, Programs, Tools



# Mid-Career: Can be both Exciting and Overwhelming

- Covid has changed things, including our priorities
- 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?



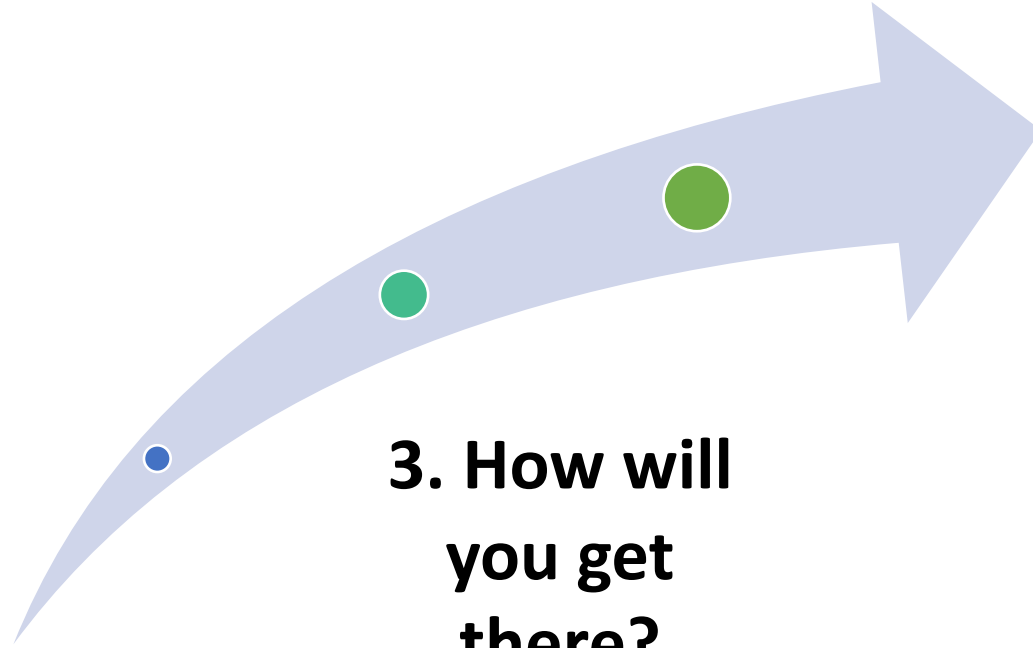
**Prioritize** creating a strategic plan for your research, scholarship, or creative activity. It will ultimately **help to decrease the overwhelm** and help you use your time more efficiently.

# What is Strategic Planning?

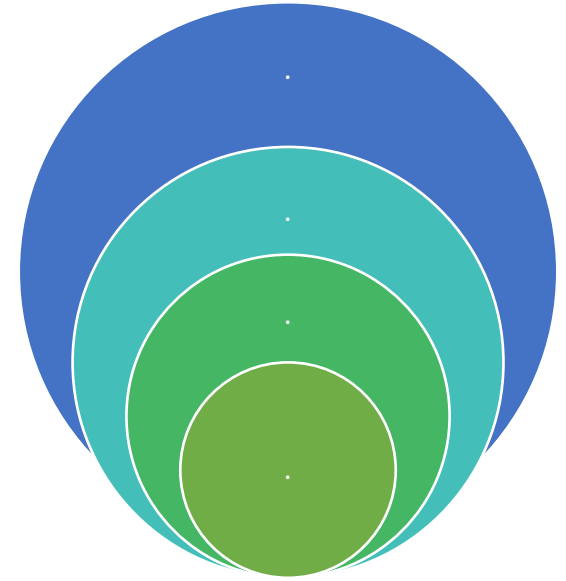
**2. Where are you now?  
Current State**



**3. How will you get there?**



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



# 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 resources and time to the activities with the most beneficial impact

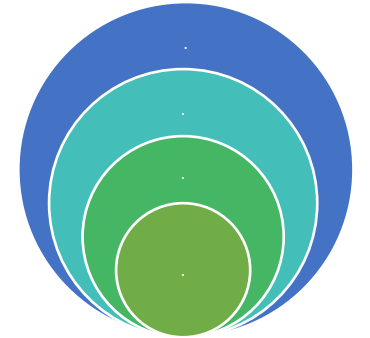
# Scaffold of a Strategic Plan

- Define your long-term research/scholarly vision
- Self-evaluation
  - Strengths and weaknesses
  - Current progress toward goal
- Define short-, mid- and long-term objectives 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?
- What difference or impact do you want to make?
- What critical issue(s) do you want to respond to?
- What capacity / expertise do you have?
- What should your priorities be? Where should you allocate time and resources?
- Where are the best opportunities for funding?



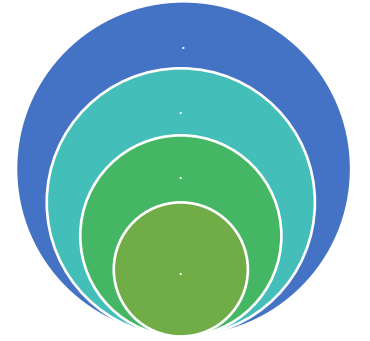


# What Does “Success” Look Like for YOU?

- Publications, book chapters
- Performances, juried exhibitions
- Field work
- Invited talks
- **Extramural Funding**
- Professional, institutional awards
- Advising / mentoring track record
- Grants or Fellowships awarded
- Other indicators of excellence in teaching or research

## **Understand the expectations / metrics :**

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



## **Breakout Session 1. (20 minutes)**

### **Defining 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 current status of your research/scholarship/creative activity right now?

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



# (Re)defining your Research Impact Identity

*Impact sweet spot!*

What would I LOVE to do?

You

What CAN I Do?

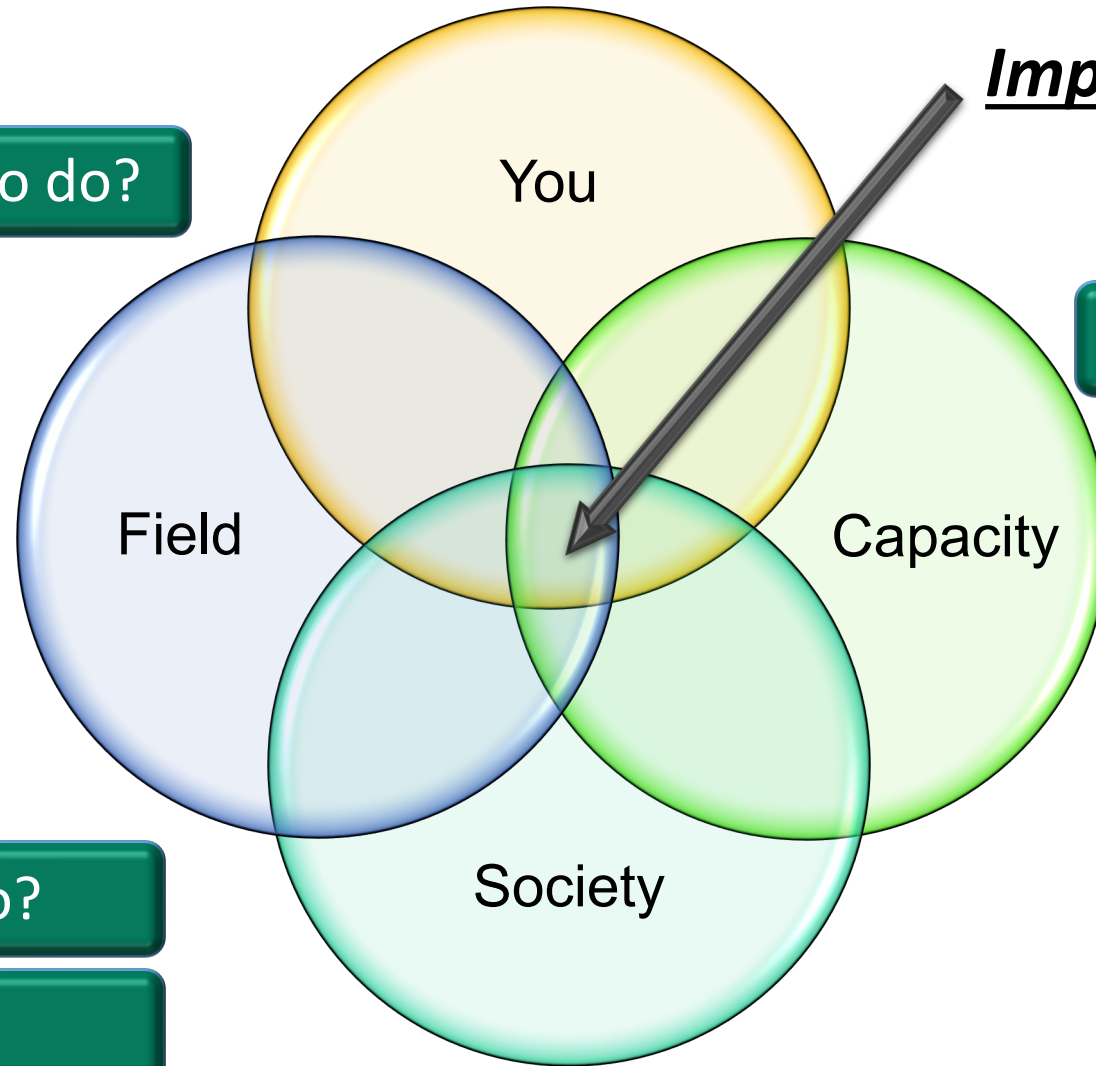
Field

Capacity

What SHOULD I do?

Society

What is needed?





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

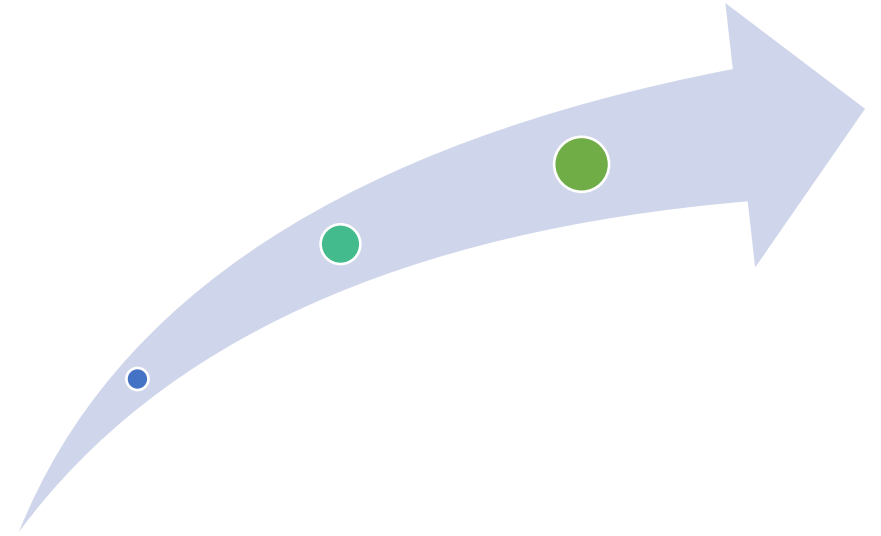
Does your current research/scholarship align with  
your vision?

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

What is your research impact identity?

# Create the Plan to Bridge the Gap between Your Current and Future States

- **Work backwards** from your Vision/Future State
- Develop a plan with **annual objectives** in those “success” activities
- For each annual objective, create more detailed “**milestones**”



# Objectives should be “SMART”



Specific	Measurable	Attainable	Relevant	Time-Bound
Make sure your goals are focused and identify a tangible outcome. Without the specifics, your goal runs the risk of being too vague to achieve. Being more specific helps you identify what you want to achieve. You should also identify what resources you are going to leverage to achieve success.	You should have some clear definition of success. This will help you to evaluate achievement and also progress. This component often answers how much or how many and highlights how you'll know you achieved your goal.	Your goal should be challenging, but still reasonable to achieve. Reflecting on this component can reveal any potential barriers that you may need to overcome to realize success. Outline the steps you're planning to take to achieve your goal.	This is about getting real with yourself and ensuring what you're trying to achieve is worthwhile to you. Determining if this is aligned to your values and if it is a priority focus for you. This helps you answer the why.	Every goal needs a target date, something that motivates you to really apply the focus and discipline necessary to achieve it. This answers when. It's important to set a realistic time frame to achieve your goal to ensure you don't get discouraged.

# Objectives should be “SMART” – “SMARTER?”

Actionable

Every goal should start with an action verb, rather than a “to be” verb



Specific	Measurable	<del>Attainable</del>	Relevant	Time-Bound
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Exciting

You should be personally excited about the goal. If this isn't the case, then you likely won't have the motivation necessary to continue pursuing it when you encounter unexpected challenges.



Risky

A good goal should stretch you, but not too much. Go up to the edge of your comfort zone. If you are not out of your comfort zone, you may not be thinking big enough.



# Example Milestones

## Publications:

- Draft chapters 1-2 by <date>
- Solicit feedback from 2 colleagues by <date>
- Experiments a, b, c done by <date>
- Archival work completed by <date>
- 20 interviews completed by <date>

## Grant – Deadline X

- Discuss idea with program manager by <date>
- Outline by <date>
- Administrative items done by <date>
- Draft one by <date>, draft two <date>
- Send to colleagues for feedback by <date>

# What Does a Strategic Plan Look Like?

- Don't overcomplicate things – use whatever format works well for you

## Example 1

.....  
Aimee R. Dietz, M.S., CCC-SLP  
Doctoral Candidate  
University of Nebraska-Lincoln  
Department of Special Education and Communication Disorders  
.....

### Five-Year Plan Outline

#### Research

1. Establish a research laboratory to study acquired neurogenic communication disorders, specifically:
  - the impact of visual scene displays (VSDs) on the language comprehension and production of people with chronic aphasia. (Years 1-2)
2. Collect pilot data on the relation between visual scene displays and sentence-level reading comprehension by people with moderate, chronic aphasia. (Year 1)
3. Apply for NIH-NIDCD funding using dissertation and pilot data (Year 2):
  - Write an R03 proposal for a study investigating the impact of VSDs on the reading comprehension by people with chronic aphasia.
4. Revise grant if funding not approved (Years 2-3)
5. Continue to collect and analyze data, regardless of grant status (Years 3-4)
6. Finalize tenure file (Year 5)

#### Publishing

1. Publish dissertation findings—minimum of 2 (Years 1-2)
2. Publish completed projects and projects in progress:
  - a. A paper on the relation between motor and cognitive contributions to speech rate changes following traumatic brain injury. (Year 1)
  - b. A paper on the changes in social roles in people with severe, chronic aphasia. (Year 1)
  - c. A paper on the relationship VSDs and auditory comprehension by people with chronic aphasia (Year 2)
3. Publish manuscripts from data collected in second and third years (Years 4-5)

#### Teaching:

1. Meet students (Year 1)
2. Develop curricula for courses (Years 1 & 2)
3. Offer students research experiences (Years 1-5)
4. Mentor students on research projects (Years 1-5)
5. Begin to recruit doctoral students at national conferences (Year 2)

#### Professional Service & Development:

1. Become familiar with other faculty members' research programs (Year 1)
2. Establish and develop inter- and intra-departmental and community collaborations (Years 1-5)
3. Continue to be involved with professional associations (ASHA)
4. Present regularly at scientific meetings
5. Review manuscripts for scientific journals



THE GEORGE WASHINGTON UNIVERSITY

# Computational Biology Institute

Dr. Keith Crandall, Director



Innovation Mall | 4508j University Drive | Suite 305  
Arlington, Virginia 22247  
Phone: 703.553.0146  
E-Mail: [cbi@gwu.edu](mailto:cbi@gwu.edu) | Web: [www.cbi.gwu.edu](http://www.cbi.gwu.edu)

## CBI Strategic Funding Plan

### Background

The Computational Biology Institute (CBI) at the George Washington University (GW) is an interdisciplinary effort building on GW's strengths in life sciences and computational science, in addition to the wealth of research centers in the Washington, DC-area. By bringing together GW experts and scholars from partner institutions, CBI will provide cutting edge research, enable broad educational activities in computational biology and provide computational biology services to university researchers and public and private partners. Critical to the ability of CBI to develop and sustain cutting edge and seminal research discovery is a robust and diverse funding portfolio to support the faculty and their research, inspiring boundryless innovation to attract the best talent and contribute to our Nation's call for advancement in science & technology.

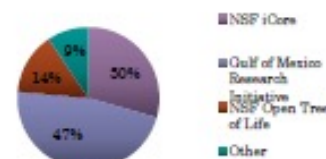


### Purpose

The purpose of this medium range strategic plan is to identify funding opportunities spanning foundation, federal and industry funding for the new CBI, building around the research and leadership of CBI Director, Dr. Keith Crandall.

Our objective is to increase funding for the Director and his key faculty, support research and learning opportunities for postdoctoral fellows, doctoral candidates, and K-12 STEM students, and data core facilities.

Dr. Keith Crandall, M.D.  
Director, Research Recruitment



CBI Baseline Funding, 2013

# Example: How to strategically plan for Funding Opportunities

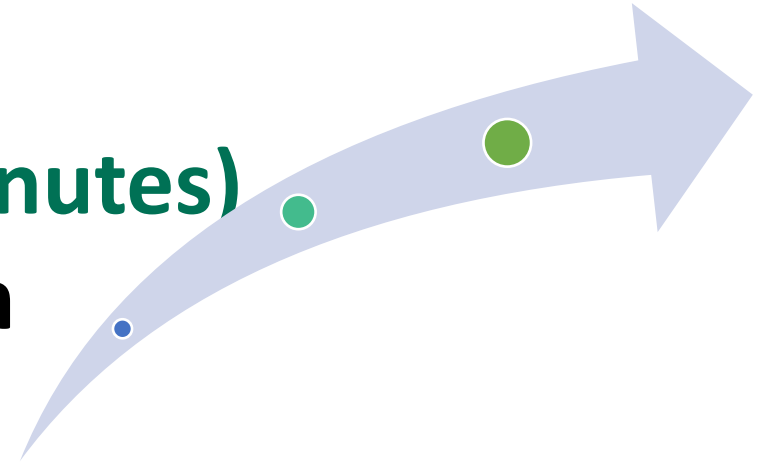
- Assess the competition – award databases, abstracts
- If you aren't competitive now, what activities do you need to focus on to become competitive and how would you fund those? (*Milestones*)
  - e.g., more preliminary data, publishing, develop collaboration, serve as a reviewer to gain insight
- Work backwards from your goal timeframe (*Timeline*)
- Allow time for resubmission

# Example Strategic Plan with Integrated “Funding Roadmap” (Mid-career Faculty example)

	Teaching	Research /Scholarship	Funding
Year 1	<ul style="list-style-type: none"> <li>develop content for new graduate course <b>&lt;by date&gt;</b></li> </ul>	<ul style="list-style-type: none"> <li>Identify collaborators for new Project <b>&lt;by date&gt;</b></li> <li>Collect preliminary data for new Project <b>&lt;by date&gt;</b></li> </ul>	<ul style="list-style-type: none"> <li>Apply for UVM internal funding <b>by Jan.</b></li> <li>Determine program “home” for my research at &lt;funder&gt; <b>by March</b></li> <li>Develop relationship with Program Officer – set up meetings <b>by Apr</b></li> </ul>
Year 2		<ul style="list-style-type: none"> <li>Publish abstract <b>&lt;by date&gt;</b></li> <li>Attend conference <b>&lt;by date&gt;</b></li> <li>Continue relationship building with collaborators <b>&lt;ongoing&gt;</b></li> </ul>	<ul style="list-style-type: none"> <li>Determine grant submission logistics at UVM <b>by Jan</b></li> <li>Submit grant to &lt;funder&gt; <b>by deadline</b></li> </ul>
Year 3			<ul style="list-style-type: none"> <li>Submit resubmission <b>by deadline</b></li> </ul>
Year 4			
Year 5			

## **Breakout Session 3. (10 minutes)**

### **Developing your Plan**

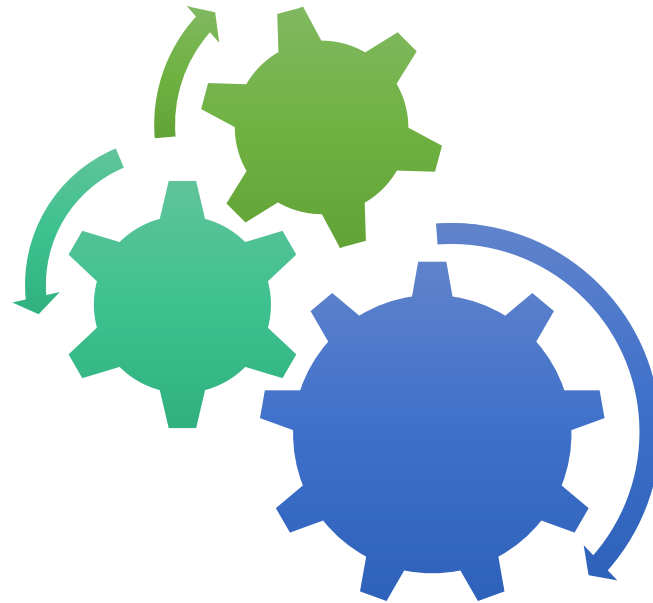


What are some of the mid-range milestones in your plan?

What are some of the initial steps?

What barriers to progress can you anticipate?

## 4. Resources to support your strategic plan





# Strategic Resources – Research Development!



The screenshot shows the website for the Office of the Vice President for Research (OVPR) at the University of Vermont. The page features a green header with navigation links for 'APPLY', 'SEARCH', and 'MYUVM'. The main content area is titled 'Research Development' and includes a brief description of the office's services. Below this, there are four menu items: 'Communication of Funding Opportunities', 'Limited Competition Management', 'Research Proposal Development and Project Management', and 'Grant Writing Tools, Resources, and Workshops'. On the right side, there is a search box for 'Pivot-RP' with a 'Search' button. At the bottom, a green banner contains the text 'Research Development - Request for Support' and the University of Vermont Research Development logo.

**The University of Vermont**

APPLY SEARCH MYUVM

MENU OFFICE OF THE **VICE PRESIDENT FOR RESEARCH (OVPR)**

## Research Development

Research Development offers a suite of services to support faculty efforts to obtain extramural funding for their research, scholarship, and creative activities.

- Communication of Funding Opportunities
- Limited Competition Management
- Research Proposal Development and Project Management
- Grant Writing Tools, Resources, and Workshops

Search for funding using Pivot-RP. Try a quick search below or [log in](#)

**Pivot-RP**  
funding opportunities

Search

**Research Development - Request for Support**

THE UNIVERSITY OF VERMONT  
RESEARCH DEVELOPMENT

<https://www.uvm.edu/ovpr/research-development>

# Research Development

- **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**

# RD Project Management

- For 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

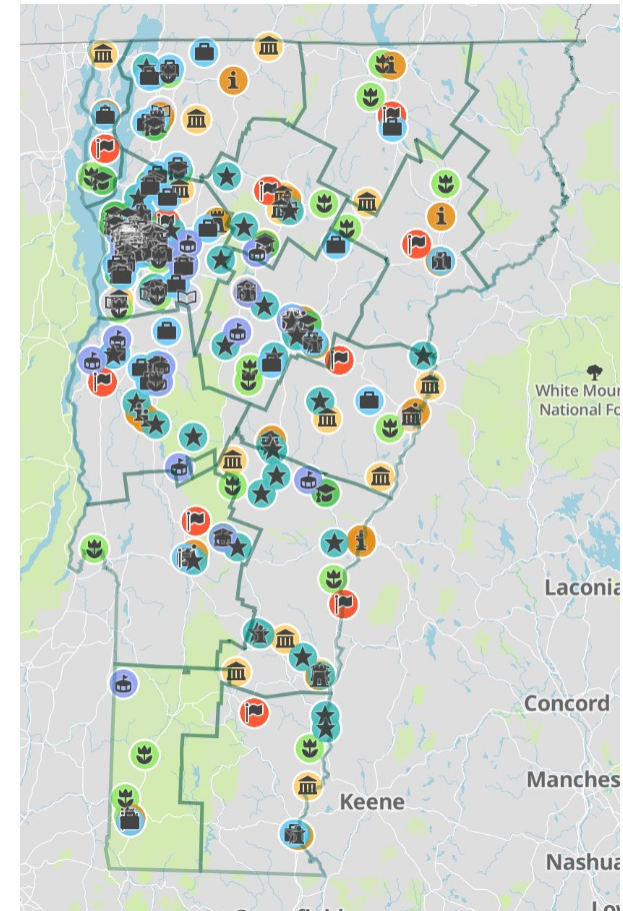
Date	Deliverable(s)
March 19 – April 1	Write <b>Specific Aims</b>
<b>April 2</b>	<b>Specific Aims (1<sup>st</sup> Draft) Completed</b>
April 3 - 29	Write <b>Research Strategy</b>
By April 20	Begin <b>budget</b> development with business manager support
<b>April 30</b>	<b>Research Strategy (1<sup>st</sup> Draft) Completed</b>
May 3 - 19	Iterative revisions to <b>Research Strategy</b> ( <i>as needed</i> )
By May 7	Enter grant information into UVM Click
May 10 - 24	Write/update <b>Supporting Documents</b>
By May 11	Complete first draft of <b>full budget</b> (in UVM Click)
May 19	Revise <b>Budget</b> if needed, write <b>Budget Justification</b>
<b>May 20</b>	<b>Full, "near final" Project proposal completed</b>
May 21 - 26	PI, grant developer, colleagues review of text
May 26	All <b>final, signed Letters of Support</b> due ( <i>if applicable</i> )
May 26	All <b>final biosketches</b> and <b>Other Support</b> due
May 26 – June 1	Finalization of all documents
<b>Wed, June 2</b>	Upload all final documents into <u>UVMClick</u> and <b>ROUTE</b> proposal
On or before Fri, <b>June 4</b>	<b>GOAL:</b> proposal submission
<b>Mon, June 7</b>	<b>NIH Proposal submission deadline</b>

# Strategic Resources – UVM Office of Engagement

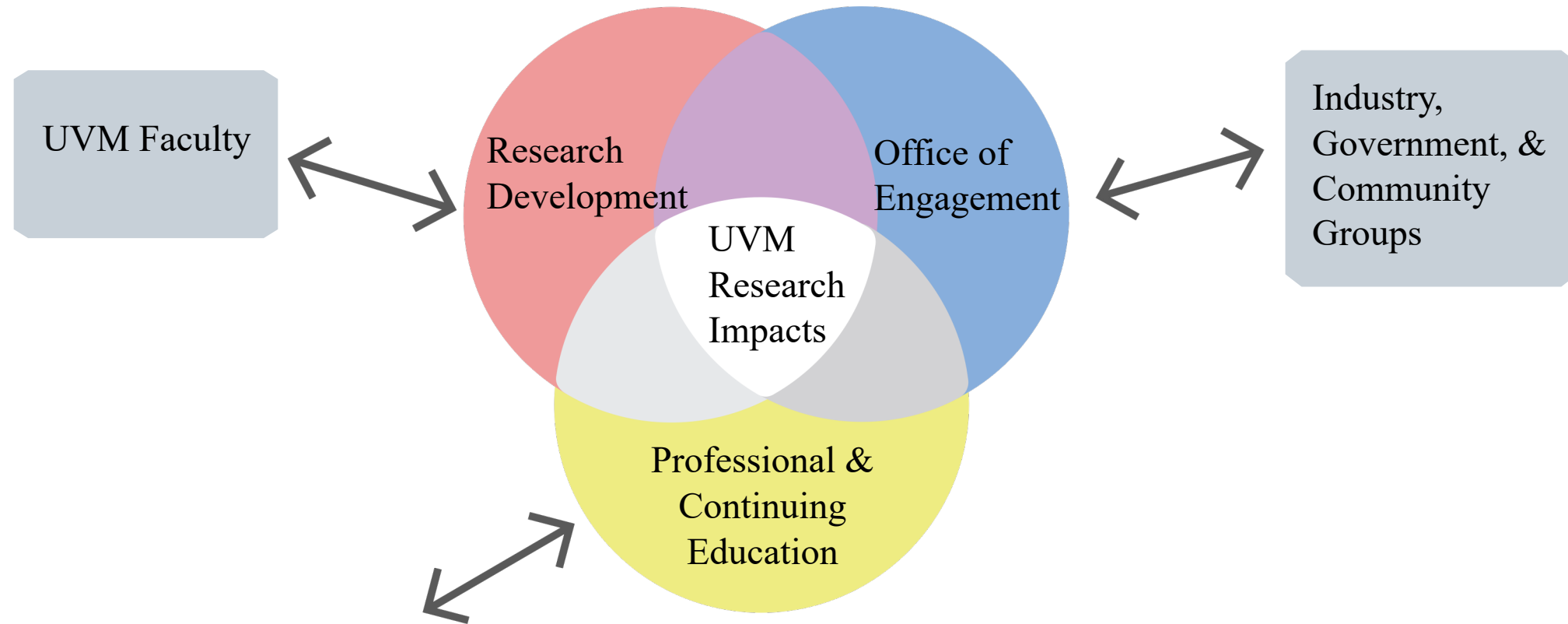
- UVM’s “front door” for private, public and non-profit entities and communities looking to access UVM’s strengths and capabilities
- Find collaborators inside and outside UVM
  - Inside: Faculty Insights tool
  - Outside: Building relationships on the institute level

[www.uvm.edu/engagement](http://www.uvm.edu/engagement)

UVM Engagement Map



# Strategic Resources – UVM Research Impacts



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

Request a consult!

<http://www.uvm.edu/ovpr/uvm-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
- Regularly obtain feedback on your strategic plan
- 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.



# How to Request Research Development Support

- Initiate contact early – **6-12 weeks in advance** of your deadline
- Submit **requests** with info about **funding opportunity** and **deadline** on our website: <https://www.uvm.edu/ovpr/research-development>
- Set up a phone call or coffee meeting to:
  - Communicate overview of project
  - Early consult to answer questions or if unfamiliar funding agency
  - Discuss any concerns

[Research.Development@uvm.edu](mailto:Research.Development@uvm.edu)

[resdev@uvm.edu](mailto:resdev@uvm.edu)



# For Additional Questions:

**Jeralyn Haraldsen, *Director***

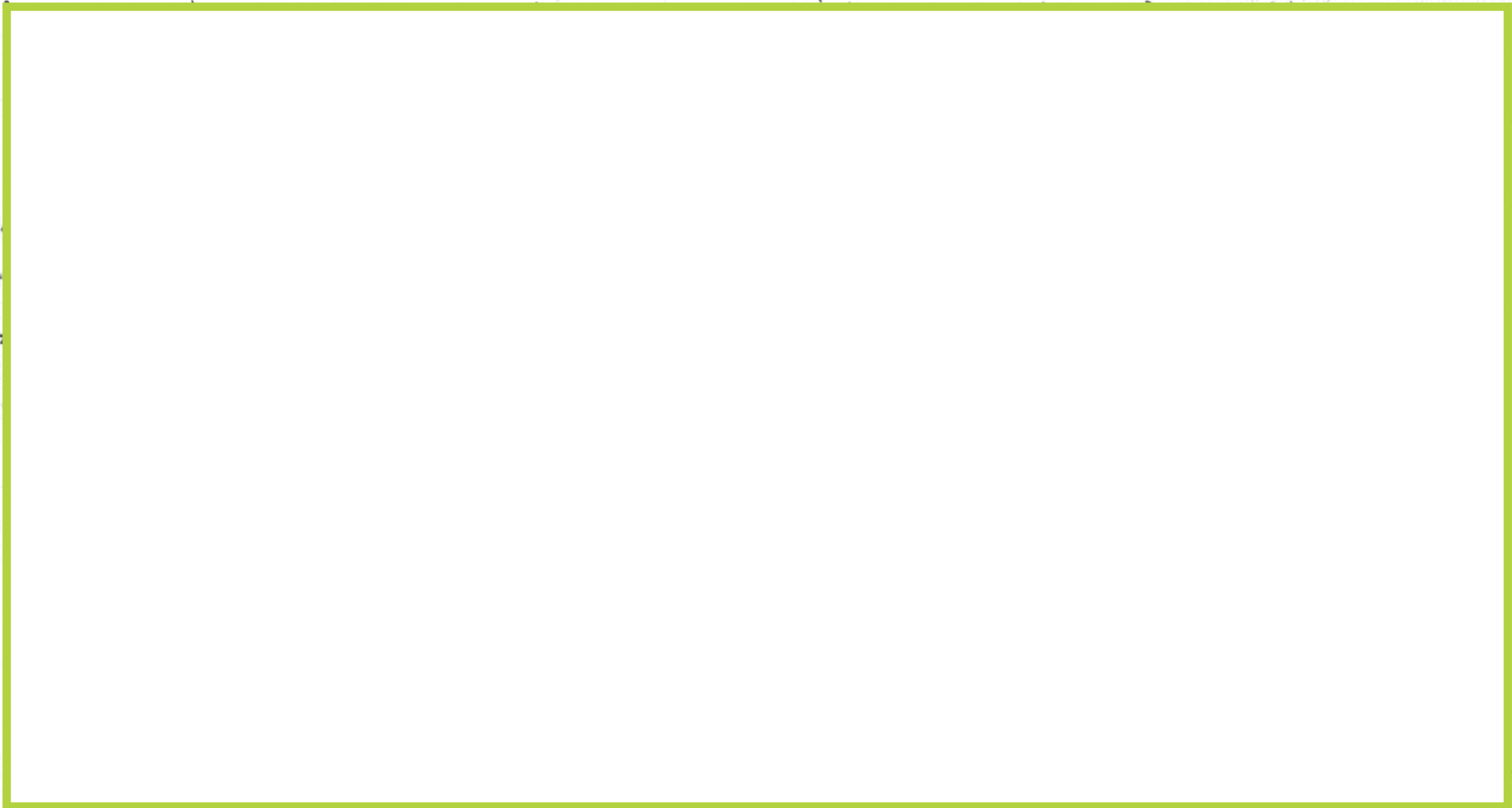
Office: 342A Waterman

Email: [Jeralyn.Haraldsen@uvm.edu](mailto:Jeralyn.Haraldsen@uvm.edu)

Phone: 656-2982

<https://www.uvm.edu/ovpr/research-development>

Email: [Research.Development@uvm.edu](mailto:Research.Development@uvm.edu)



# Time Management

## Time Management Matrix

	Urgent	Not Urgent
Important	<p><b>1. The Quadrant of Urgency</b></p> <ul style="list-style-type: none"><li>- Crises</li><li>- Pressing problems</li><li>- Deadline-driven projects, meetings, preparations</li></ul> 	<p><b>2. The Quadrant of Quality</b></p> <ul style="list-style-type: none"><li>- Preparation</li><li>- Prevention</li><li>- Values clarification</li><li>- Planning</li><li>- Relationship building</li><li>- Empowerment</li></ul> 
Not Important	<p><b>3. The Quadrant of Distraction</b></p> <ul style="list-style-type: none"><li>- Interruptions, some phone calls</li><li>- Many pressing matters</li><li>- Many popular activities</li><li>- Some emails, reports &amp; meetings</li><li>- Often deceptive &amp; highjacks time</li></ul> 	<p><b>4. The Quadrant of Waste</b></p> <ul style="list-style-type: none"><li>- Trivia, busywork</li><li>- Junk emails</li><li>- Some phone calls</li><li>- Time wasters</li><li>- 'Escape' activities</li></ul> 

- Can make a matrix for the year, semester, month, week or day
- Be honest with yourself, account for all your time
- Goal is to focus on tasks in Quadrant 1 & 2
- Other resources:
  - *Getting Things Done (GTD)*, by David Allen
  - *Deep Work*, by Cal Newport



To learn more, scan the QR code with the camera on your phone or visit [www.asl.co.nz/timemanagement](http://www.asl.co.nz/timemanagement)

# Self-regulated Project Management

- SCHEDULE time on your calendar of choice (Outlook, Teams, Google, etc) for your Quadrant 2 activities. Keep the time reasonable for the task, and in balance with the time available in the day for Quadrant 1 activities (*aka time blocking*)
  - Then STICK to it, even when other tasks pop up that day
- Block time for (re)assessing strategic planning!
- Consider making project TIMELINES for your long-term goals,
  - Work backwards from when you'd like your goal completed
  - Identify 3-5 milestones to break the goal up into manageable tasks
  - Use identified tasks to schedule time on your calendar

	SUN 19	MON 20	TUE 21	WED 22	THU 23	FRI 24
GMT-04						
8 AM		Meeting 8 – 9am	Meeting 8 – 9am	Meeting 8 – 9am	Meeting 8 – 9am	Meeting 8 – 9am
9 AM		Meeting 9 – 10am	Task 9 – 11am	Task 9 – 11am	Meeting 9 – 10am	Meeting 9 – 10am
10 AM		Task 10am – 12pm			Task 10am – 12pm	Task 10am – 12pm
11 AM			Meeting 11am – 12pm	Meeting 11am – 12pm		
12 PM		Lunch 12 – 1pm	Lunch 12 – 1pm	Lunch 12 – 1pm	Lunch 12 – 1pm	Lunch 12 – 1pm
1 PM		Task 1 – 4pm	Task 1 – 4pm	Task 1 – 2pm	Task 1 – 3pm	Task 1 – 4pm
2 PM				Meeting 2 – 3pm		
3 PM				Task 3 – 4pm	Meeting 3 – 4pm	
4 PM		Meeting 4 – 5pm	Meeting 4 – 5pm	Meeting 4 – 5pm	Meeting 4 – 5pm	Meeting 4 – 5pm
5 PM						