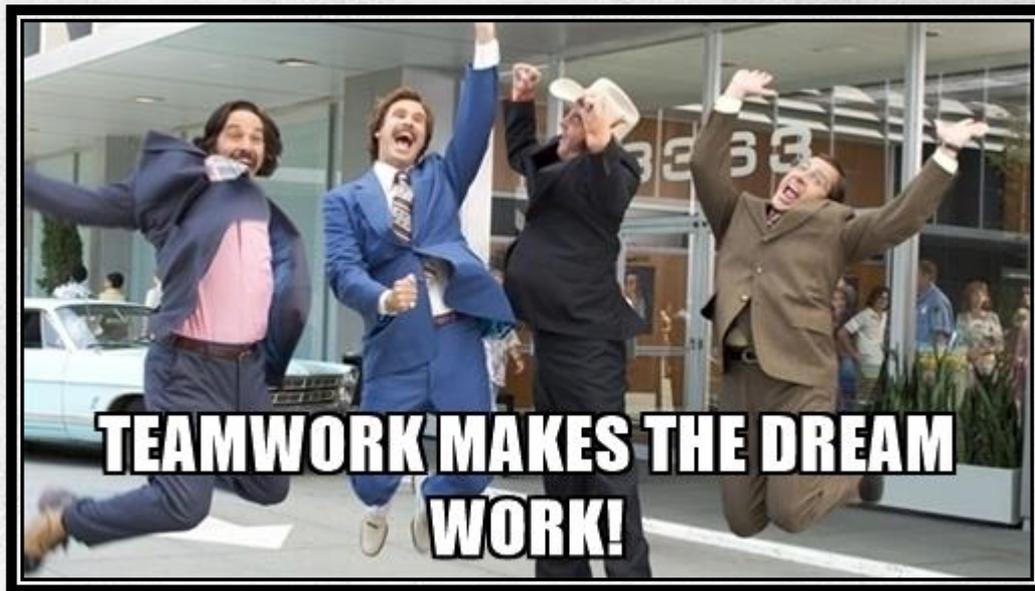


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Building and managing teams for successful proposals

Office of Research and Economic Development
Research Seminar Series
January 18, 2018



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Today's goals:

1. Understanding your needs and goals
2. Differentiating types of teams
3. How to demonstrate your team's expertise
4. Your role as the leader or team member
5. Getting the most from your team
6. Challenges and how to overcome them

Understanding your needs and goals

1. Know the function (agencies/opportunities)
2. Know thyself (strengths/weaknesses).
3. Do you want to lead an effort, or are you looking to join a team?
4. Project-specific or long-term group?
5. Two types of teams for the players: The project and the proposal.

Identify Your Goal(s)

This might be as simple as identifying a grant to write a proposal for a company to propose research for work. The end state of the goal typically includes two parts:

1. Submitting a proposal for money
2. Winning the money and then completing the work in order to get paid

Identifying your goal(s)

Most tenure track faculty have larger career goals that push them to constantly pursue either winning more money or other various forms of academic currency such as publications, patents, teaching experiences/awards, etc. Those larger career goals that probably have people attending our session include:

- i. Justifying your academic existence
- ii. Getting tenure
- iii. Increasing your “rank” within your national or global community of researchers

Identify Your Idea

Chances are likely that if a proposal caught your attention, you already have some idea of how your research could be used to write a competitive proposal.

Or, its possible you are aware of someone else's research that would be a good fit. In this case, you may have the desire to reach out to them in order to gauge their interest in submitting a proposal thereby using you as a Co-PI in the proposal.

Identify Your Idea cont..

From personal experience and in most cases, if I see a brand new proposal opportunity and want to pursue it, the only way I find that I'm able to follow through on the submission is if I lead as PI. This doesn't include opportunities that research partners and I have been discussing and are already working towards.

Know Your Personal Strengths and Weaknesses

(as both a technical expert AND as a leader/group member)

- What are you good at? What are you not good at? Are you being honest with yourself?
- Are you really the smartest person in the room? Do your mentors and peers agree with your assessment of yourself?
- My personal opinion based on many years of real-world project management experience is that successful project team leaders are able to ask themselves these questions and provide honest answers or be willing to take open feedback from others even when it's difficult.
- How do you know what strengths you need on your team if you aren't honest about the weaknesses that you have?

Know Your Capacity Strengths and Weaknesses

- What does the opportunity require in terms of personnel and expertise? What about facilities and/or equipment? Support?
- Even if we have it, is ours the BEST?
- Are there strategic considerations? Legislative? Regulatory? Geographic? Population? Economic? Etc.
- Have you adequately reviewed the current state of knowledge on the issue? Can you sufficiently demonstrate that you are trying to address the problem in it's most appropriate environment and with the appropriate resources?
- From a preparation standpoint, do you have adequate support resources? What about your proposed team?

Types of teams and players

Differentiating types of players needed for proposal preparation and project management

Strategic vs. Support

- Strategic partners are people or entities that you would design your research or methodology around. They are people who directly influence or are included in the proposal itself and are on the hook for doing work if you win.
- Support partners help you achieve all the requirements of your proposal submission and/or help you validate that all protocols are correctly followed should you win the award.

Choose Your Strategic Partners:

What other researchers are you going to include as Co-PI? What industry partners do you need to bring aboard to be more competitive? What government or military agency would best fit to be included/referenced/supported in the proposal? Which venture capitalist can serve as the most helpful mentor as your work to invent something new? Which K-12 school, community college, or peer university would be the best partner?

- Continue to grow your network.
- Know when to be selfish with yours and other's times and when to be selfless and give back to others so that you can grow a mutually beneficial partnership with someone you want to work with now and many years to come.
- Work to learn about any limitations (in addition to strengths) strategic partners bring to the project.

Choose Your Support Partners:

When it comes to preparation, support partners are those who help you review your proposal and submit, Who help you review budget, edit, upload, etc. For project management, these support partners include any support personnel not necessarily named in the proposal and might even include students, as well, that you might have in mind to work on the project should you win.

- Same thoughts here that you need to grow your network so that when administration hears about a problem that needs to be solved, you are one of the people they consider as they try to align opportunity with university research capability

Who, why, how to reach out?

Anecdote: I have very little luck reaching out to others regarding using their research to pursue a new research grant opportunity and asking that I be a Co-PI and help them. The reason is because that other researcher generally already knows about the research opportunity and has already been working on a submission using their Co-PI's that they've already reached out to.

- Does this mean that I should never reach out to someone about being a PI on a grant idea with being in the support role? No, because it never hurts to ask. If you don't ask, and you don't want to be PI, then you definitely have 0% chance at reaching that goal.

Resources for recruiting teammates

- Intra- or extra-departmental working groups
- Professional organizations/Industry networks
- Support staff
- Funders (previous recipients/POs)

Demonstrating your team's expertise and capacity

1. Biosketches
2. Current & Pending Support
3. Collaborators
4. Facilities and Other
5. Letters of Support/ Commitment

Execute

Divide and conquer on the proposal. Agree, divide, and complete the work should you win the award.



Your role as the leader or a team member

The reality is that, whether you like it or not, you're going to have to be a project manager in order to experience continued success either in winning awards or holding together a productive team who continue to like you after working with you.

1. Planning vs. responding (same approach – general description, SMART objectives)
2. Defining roles and responsibilities for the project AND the proposal. (logic model/ org charts) compare ideas and goals/objectives – have everyone write them
3. The name game – who do they know?
4. Ground rules for communications
5. Realistic timelines
6. Tools and transparency

Engaging and getting the most from your team

1. Keeping the main thing the main thing (no metameetings)
2. Compelling. Why does it MATTER?
3. Creating a solid work plan (project AND proposal)
4. Contact info
5. Incentives?
6. Meet them where they are – work styles
7. Assign equal parts “sexy” and “lame”
8. Attitude of gratitude
9. Evaluating

"there is no limit
to what can be
accomplished if it
doesn't matter
who gets the
credit"

Challenges and how to overcome them

1. Distance; style; delays; language?
2. Control issues
3. Group dynamics
4. That one guy/gal.....

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Thank you & good luck!

Questions?



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