

ITHS Team Science Boot Camp



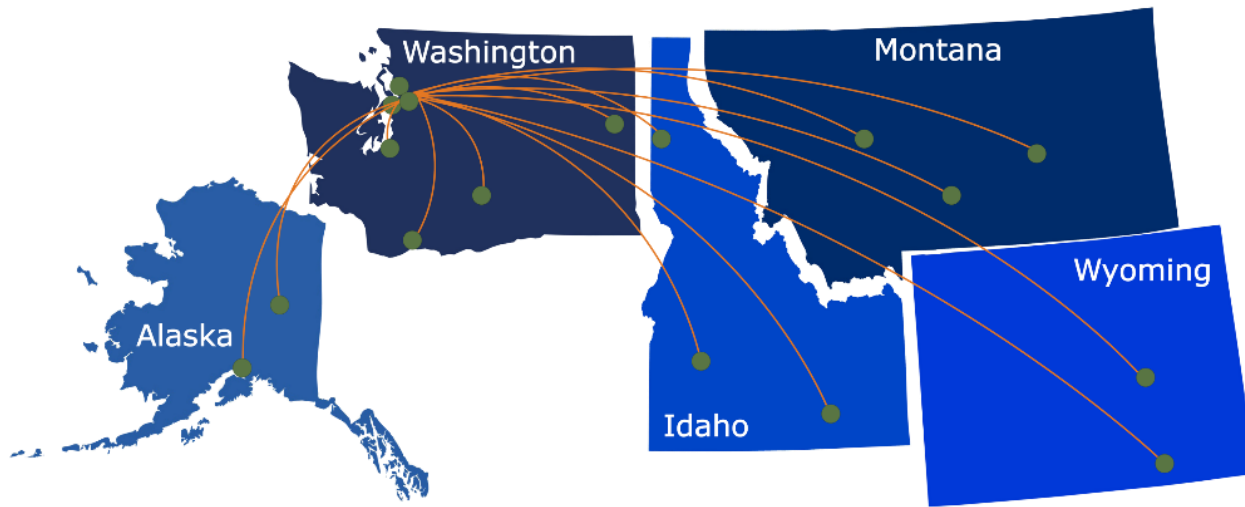
February 24-25, 2020
Waterfront Activity Center

ITHS

Institute of Translational Health Sciences
ACCELERATING RESEARCH. IMPROVING HEALTH.

The Institute of Translational Health Sciences

is dedicated to speeding science to the clinic for the benefit of patients and communities throughout Washington, Wyoming, Alaska, Montana, and Idaho.



ITHS promotes this translation of scientific discovery to practice by fostering innovative research, cultivating multi-disciplinary research partnerships, and ensuring a pipeline of next generation researchers through robust educational and career development programs.

Welcome & Introductions

- ▶ Name, Profession or Discipline

(no titles please)



Workshop Objectives



**As facilitators, our
goal is to model
psychological safety
& trust**

1. Identify the value of working in teams & characteristics of high performing teams;
2. Introduce skills to improve research projects by leveraging strengths & expertise of team members;
3. Provide strategies & tools to help teams create outputs;
4. Create a safe environment for your team to practice skills & strategies.

Workshop Format/Logistics

- ▶ Folders – includes agenda & handouts
- ▶ Breaks/bathroom location
- ▶ Train-the-trainer model: consider who isn't here today from your team
- ▶ Team Time

Day 1 Brief

1. Team Science Overview & Application for your Team
2. Lean Project Management
3. Leading Teams
4. Team Time



Application for Your Team

Brenda Zierler

Team Science Overview

- ▶ What is Team Science?
- ▶ What challenges (individual or team) do see experienced on research teams?
- ▶ Strategies for improving/addressing challenges?



Questions
from the
pre-work?

Comfort Zone



Team Challenges



**Matrix
Handout**

Value-Added Meetings

Understanding Team Diversity

Giving & Receiving Feedback **Role Clarity**

Leadership Engagement

Communication

Team Processes

Project Planning & Management

Shared Goals / Purpose Psychological Safety

Conflict Management

Liberating Structures

► What are Liberating Structures (LS)?

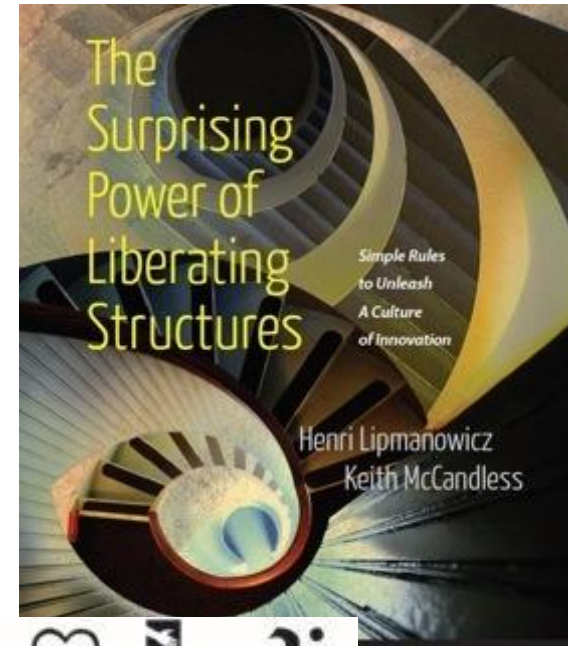
- Interactive methods to help organize groups

► When to use LS?

- Share information at meetings and conferences
- Planning and strategy
- Connecting to each other

► Why use LS?

- Inclusive of all participants
- Adaptable



1-2-All Activity – Liberating Structure

1 MIN

Individually reflect on the challenge(s) identified in the pre-survey & how they are affecting your team

2 MIN

Discuss with the person next to you

12 MIN

As a team, identify one challenge to focus & work on over the next 1.5-days

5 MIN

Report out & room discussion




Lean Project Management: Clarifying the Objective & Roles

Jennifer Sprecher

Lean-R Project Charters

Based on concepts within:

- Project management Institute
- Agile
- Continuous Improvement (PDSA)
- Theories of Change Management

Page 1 Study Name: _____		Revision Date: _____		Research Study Charter		Date Started: _____		PI: _____		 <small>Institute of Translational Health Sciences</small>	
A. Problem Statement / Need to be met by this study What is the problem being experienced? What need is this study addressing? Be specific in identifying the "pain point" to provide a basis for doing this study. Talk about problem statement – why is that important? I.e., if it takes too long, "how long"? If there is an unknown, how does that unknown affect progress towards patient care? Discussion Questions for Problem Statement/ Potential Benefits <ul style="list-style-type: none"> Does the statement give a good description of what the project is addressing? Is the issue or theme stated as it relates to the customer/stakeholder? Include quantitative data where available – something that will quantify why this is a problem – not just a one-time occurrence. Questions to be answered: Brief introduction to project: Benefits that will be realized from project:						B. Customers/End Users (i.e. patients, students, researchers, community members, special populations...) What is their role in the study? Will they be engaged throughout; are their milestones where they will be engaged? What is the method of communication? Meetings/frequency. Emails/updates, etc.					
C. Funding Organization Objectives Supported by this Study						D. Team Participants/ Selection/ Roles <ul style="list-style-type: none"> Is team member selection realistic and will members be able to contribute accordingly? Are key stakeholders and pertinent partners represented? Who is not at the table Who Knows? Who Cares? Who Can Act? Are the necessary subject matter experts included (statistical plan and support, cohort identification, study support)? What are the roles of the team members? Are all members involved to the same degree or will some be engaged at different points of the study? How will communication with the team occur? Meetings, minutes, shared drives, news bulletins... How will decisions be made and conflict be addressed? 					
E. Current State Definition Description of the current process or state of knowledge-. Include information and data to show why it is a problem or what knowledge is lacking to help support your problem statement.											
F. Included in Scope <ul style="list-style-type: none"> Where the process starts and where does it end (bookends)? Does the scope clearly define what is included in the study? 				F. Excluded from Scope <ul style="list-style-type: none"> What is specifically not in scope (off the table)? Are the items and/or areas out of scope clearly spelled out? 				H. Evaluation <ul style="list-style-type: none"> Are the metrics measurable, meaningful scorecard metrics that would support more focus and attention on attaining this goal? Do the metrics align with objectives? Are the metrics within the scope of this study? Are there appropriate qualitative data that should be collected? What outcomes are you seeking and how will you know those outcomes were achieved? If outcomes have a long lead-time in showing achievement are there leading indicators? 			
G. Objectives/Outputs /Deliverables/ <ul style="list-style-type: none"> Aims Sub Aims Outputs for each aim Outcomes for the study Is a publication one output for this study? If so, what are the topics of the publication (s) and plan for what will be needed to publish? How will your team address primary and secondary authorship? 				I. Approach & Critical Path Milestones & Time Frames <ul style="list-style-type: none"> What is the approach? Do the milestones and timelines define what needs to happen to move us to the end of the study (are all deliverables contained in the milestones)? Has each activity in the plan been specified as to when and outcome? Is the plan realistic and achievable? Is the scope of proposed work realistic for the time assigned? 							
K. Resources <ul style="list-style-type: none"> What are the anticipated resources to design/ implement the study? (estimated FTE, costs, equipment, etc) What is needed to sustain the effort once implemented? (How will the effort be sustained?) (if applicable) 				J. Risks <ul style="list-style-type: none"> Are risks clearly outlined and identify what needs to be addressed for study completion and success? Dependencies <ul style="list-style-type: none"> Are dependencies well defined within/across area of the study, i.e. all ITHS and institutions? 							

Charter ITHS modified from Seattle Children's

1

Revision Date 9/22/17

Clarifying the Objective

PROJECT CHARTER SECTION A

PROBLEM STATEMENT

- ▶ What problem or issue is your project addressing?
- ▶ What are the benefits of addressing this issue?
- ▶ What are the objectives of your project?

Table Exercise



Complete Charter Section A

- ▶ What problem or issue is your project addressing?
- ▶ What are the benefits of addressing this issue?
- ▶ What are the objectives of your project?

Table Exercise – Lean Concept Researcher Focus



- ▶ As a table discuss how “Researcher needs” affect your aim and sub-projects. Are there specific Researcher demographics that you are targeting: i.e. clinical versus dissemination science or junior versus senior researchers
- ▶ Share highlights as a group

The Team

Project Charter Section D

- ▶ Roles
- ▶ Sponsor
- ▶ Team Lead
- ▶ Facilitator
- ▶ Member

Members

Who Knows?

Who Cares?

Who can Act?

Purpose

Represent Researchers?

Community Representatives?

Underserved Populations?

Represent disciplines or
departments?

Subject Matter Experts (SME)

Involvement

All meetings

As requested

Action items

Communication

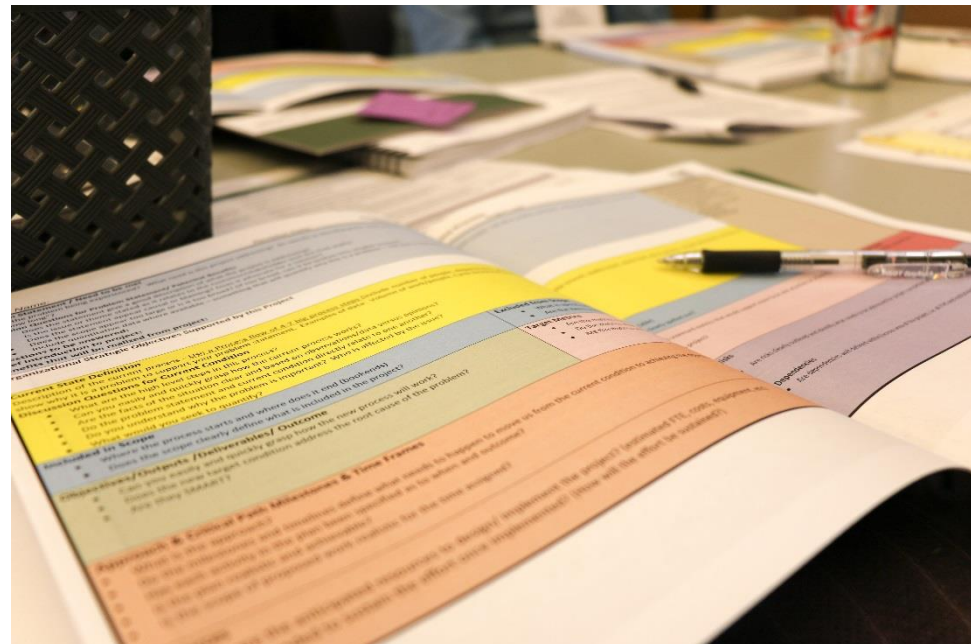


Table Exercise – Team and Stakeholders



Complete **Section D of Charter:
Team Participants**

Exercise- Troika Consulting

GROUPS OF 3 (MIXED TEAMS)

- ▶ **1 minute:** client shares project objective; what is the problem addressing?; Who is on the team & what are their roles?
- ▶ **1 minute:** Clarifying questions from consultants
- ▶ **4 minutes:** Consultants generate ideas, suggestions, coaching advice
- ▶ **1 minute:** Client shares learnings

SWITCH!



BREAK: 2:50-3:05pm



Leading Teams; Recognizing Your Impact

Brenda Zierler

Learning Objectives

1. Develop & expand basic understanding of your own & your teammate's Personal Styles
2. Understand how to use versatility to enhance effectiveness in working with other styles
3. Explore strategic uses of how your team will use styles & versatility to support your team



Great Leadership Comes Down to Only Two Rules

Personal Style Inventory (PSI)

Why is it important to know your PSI style?

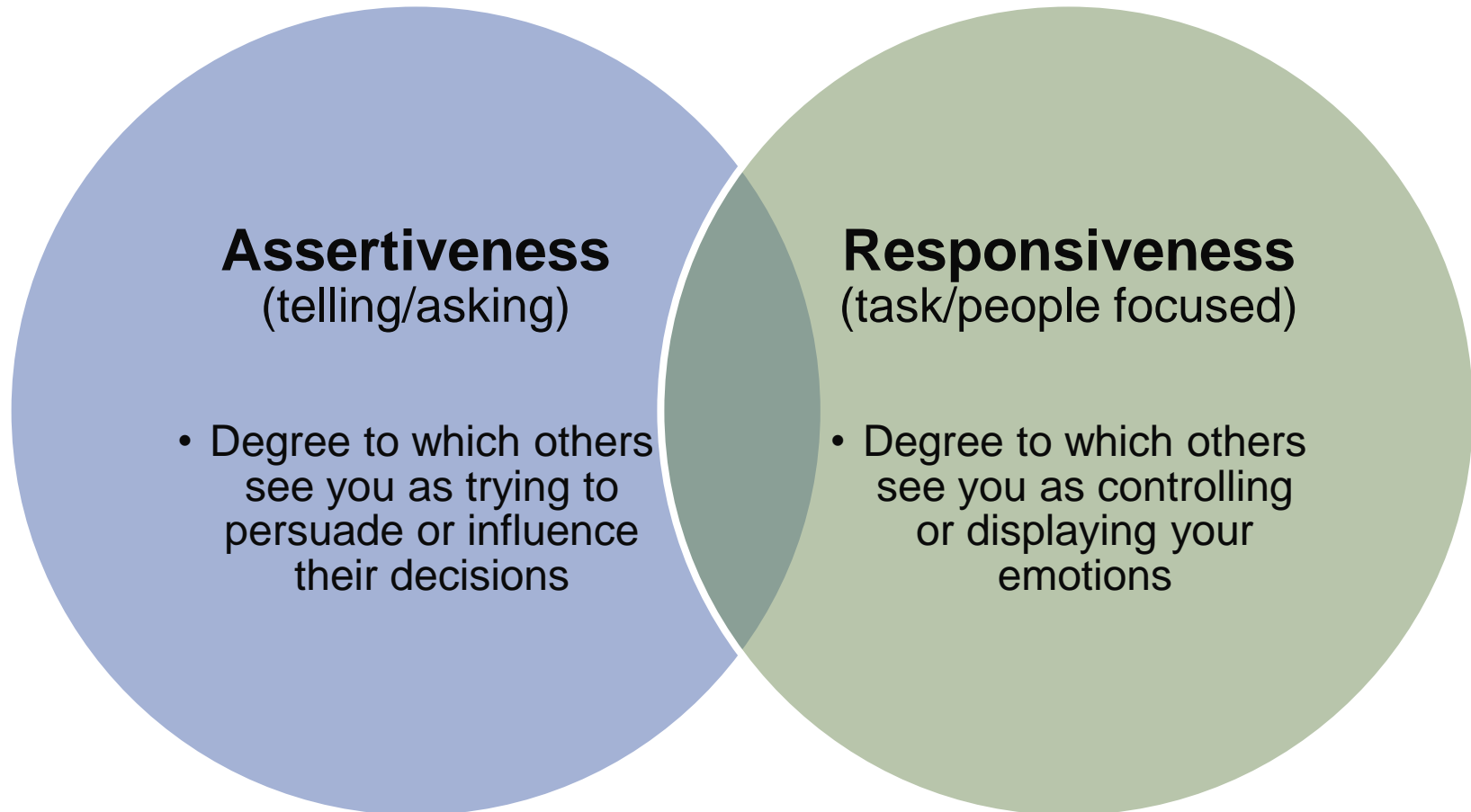
- ▶ Behavior = what we say/do, and how we say/do it
- ▶ Recognizing the impact of your **observable** behaviors or **patterns** of behavior – as perceived by others
- ▶ Each of us talks/acts in ways that are comfortable to us

Intention	Outcome
Give thoughtful, specific feedback	Get accused of being “critical”
Check-in frequently with your team members	Faulted for micromanaging

MBTI Myers-Briggs

- Designed to measure psychological preferences in how people perceive the world around them & make decisions
- MBTI describes personality using 4 pairs of opposite preferences called dichotomies:
 - ▶ Extroversion (E) or Introversion (I)
 - ▶ Sensing (S) or Intuition (N)
 - ▶ Thinking (T) or Feeling (F)
 - ▶ Judging (J) or Perceiving (P)

Dimensions of Personal Styles

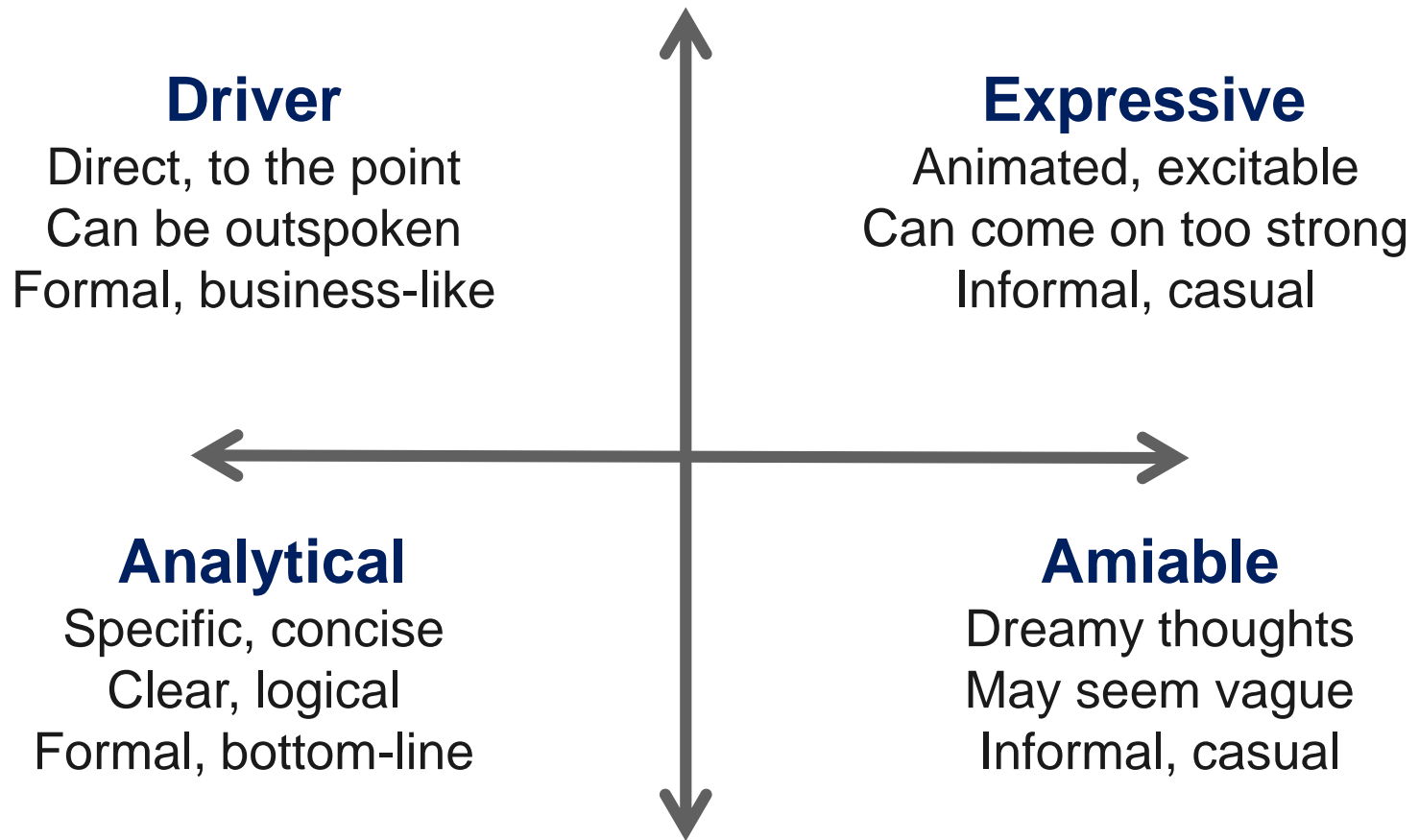


Dimensions of Personal Styles

<u>Style</u>	<u>General Focus</u>
Driver	Productivity/Action/Results
Expressive	Idea/Dream/Vision
Amiable	People/Present
Analytic	Facts/Principles/Historical

**CONTEXT
MATTERS**

Communication Style



Guiding Principles

- ▶ There is no best or worst style
- ▶ There are no pure styles
- ▶ Behavior style does not explain the whole person
- ▶ Much of the population is different from you
- ▶ We all have goals we hope to attain & results we wish to achieve

PSI Activity

FORM GROUPS BASED ON DOMINANT PERSONAL STYLE

Answer these questions:

1. What are the strengths of this style?
2. What other styles/behaviors create tension for me?
3. How is this style misunderstood?
4. Think of a song or slogan that describes this style!

Leadership through Versatility

VERSATILITY:

- ▶ Ability to adjust behavior
- ▶ Willing to focus on the needs of others more than your own
- ▶ Helps to overcome interpersonal & productivity barriers
- ▶ Dynamic measure whereas PSI is relatively static over time



Recognize Communication Differences



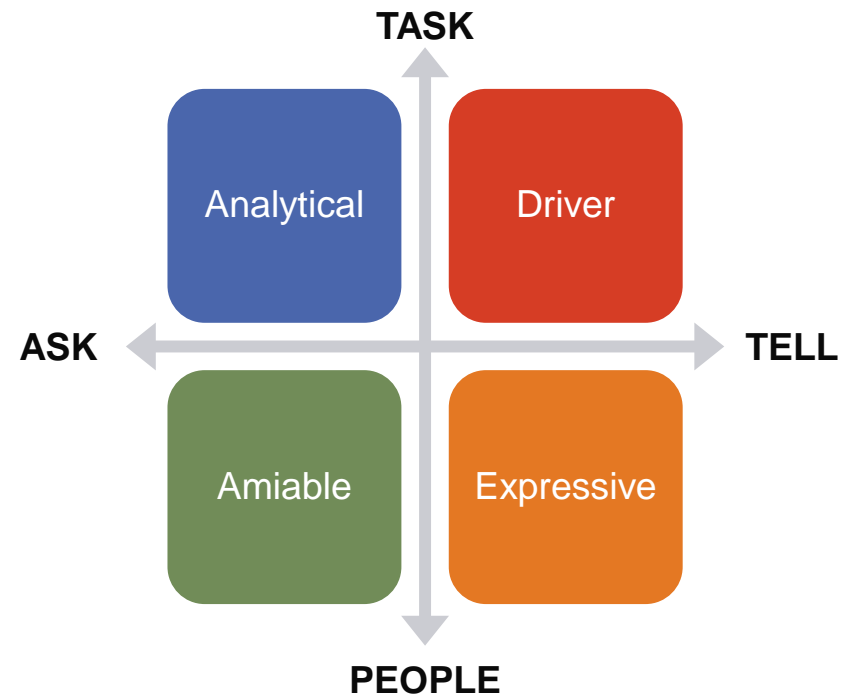
“the more I know about you, the more I know about me, and the more I can take responsibility for managing the differences between us.”

Versatility & Communication

► Skills:

1. Reflect: recognize differences in communication preferences
2. Modify: adapt to make others more open & receptive

► Outcome: create effective/productive relationships



1. Reflect

- ▶ **Ask yourself:** what does the person need from me interpersonally?

**CONTEXT
MATTERS**

EXAMPLES

- ▶ **Analytical:** may need more time to think & process
- ▶ **Amiable:** may need you to be open/honest about your feelings or need other people involved in the decision
- ▶ **Driver:** may need you to get right to the point, or focus more on the problem
- ▶ **Expressive:** may need you to be a little more flexible on time, or to hear your excitement for the issue

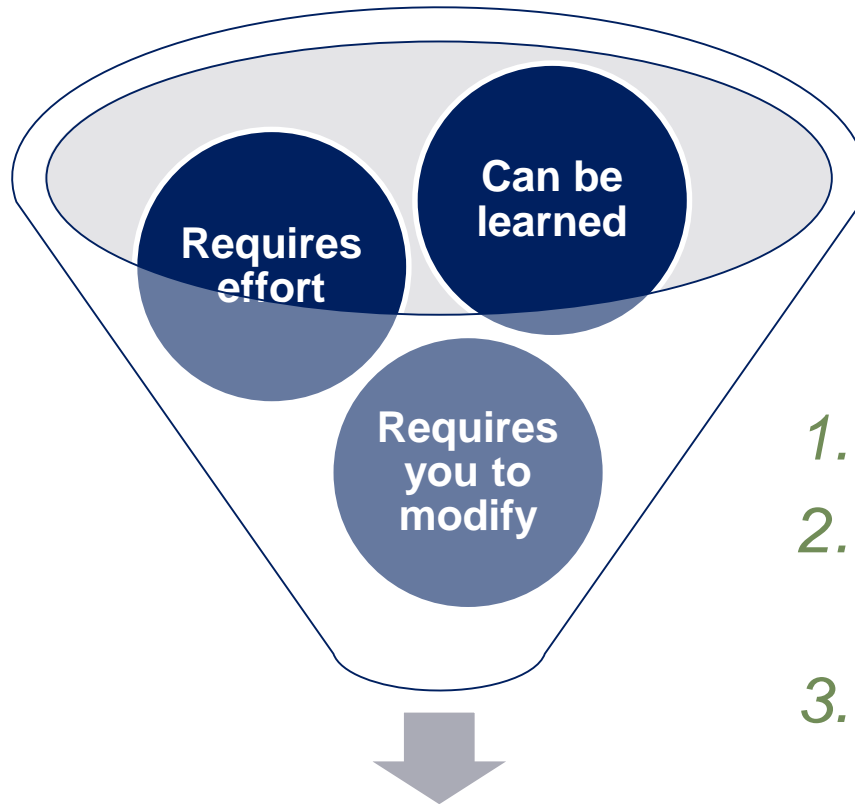
2. Modify

- Requires small changes in the PSI domains: assertiveness & responsiveness

EXAMPLES

- Ask for the other person's opinion first
- Get to the point quickly
- Use a slower or faster pace to fit the Style
- Use more or fewer gestures and facial expressions

Versatility Takeaway



**Make a conscious choice
to be versatile**

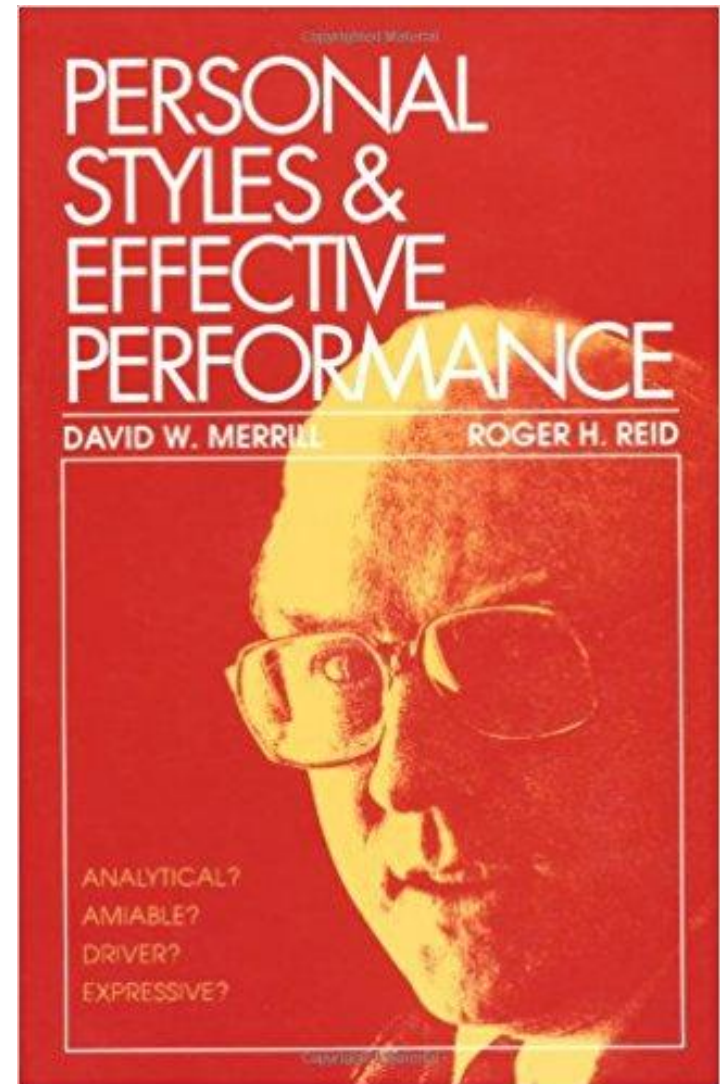
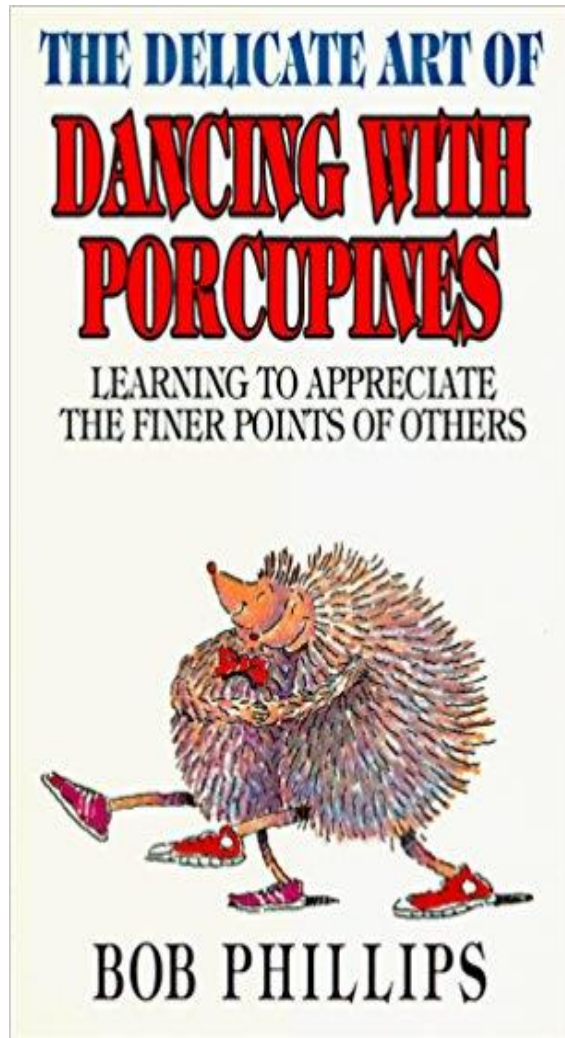
1. *Do I need this relationship?*
2. *What will be the benefits if I improve the relationship?*
3. *What will be the risks if I do not improve this relationship?*

Team Reflection

- ▶ Review your team member's Personal Style results
- ▶ Consider how your team will use styles & versatility to support your team



Resources



Resources

1. Personal styles & effective performance: make your style work for you. (Merrill & Reid, 1999)
2. Akbar, Hammad and Shah Faisal Khan, Tapping Diverse Experiences, *International Journal of Knowledge Management* 12, no. 3 (July 2016)
3. The 16 personality types, descriptions for self-discovery. (Linda V. Berens & Dario Nardi, 1999, 1981)
4. The delicate art of dancing with porcupines: learning to appreciate the finer points of others. (Bob Phillips, 1989).
5. The Business of Versatility. In Building Relationship Versatility: Social Styles at Work. Wilson Learning Worldwide, Inc.

Wrap-Up Day 1

DEBRIEF

- ▶ What went well today?
- ▶ What could be improved?
- ▶ What's one take-away from today?



Team Time

ACTIVITY: LEAN PROJECT CHARTER

- ▶ Complete first part of charter & team functioning goals for this training
- ▶ Further discuss style differences & methods of increasing versatility within your team
- ▶ **Please let facilitators know if you want help!**

THANK YOU! CONNECT WITH ITHS

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