Lean Project Management (LPM)
Jennifer Sprecher

CTSA Translational Team Science Competencies for *Individuals* & Teams

TEAM COMMUNICATION

COLLABORATIVE PROBLEM-SOLVING

MANAGING TEAM RESEARCH

Understanding Complexity

Interdisciplinary Collaboration

Interdisciplinary Research Management

Team-Based Communication

Building Trust

Facilitating Awareness & Exchange

Self-Awareness

Team Learning & Adaptive Behaviors

Meeting Management

Shared Visioning

Passion & Perseverance

Cognitive Openness & Intersubjectivity

Team Roles

FACILITATING TEAM AFFECT (BONDING)

TEAM LEADERSHIP

TRANSLATIONAL TEAM COMPETENCY DOMAINS
Individual Competencies   *Team Competencies*

ITHS | Institute of Translational Health Sciences
ACCELERATING RESEARCH. IMPROVING HEALTH.

Lotrecchiano et al, 2020 Individual and Team Competencies in Translational Research Teams. Journal of Clinical and Translational Science.

2

Create a Common Understanding

TOOLS TO SUPPORT THE 6 CONDITIONS

- Compelling Purpose
- Right Team Members
- Sound Structure

Real Team

THE
ESSENTIALS

**Right
People**

**Sound
Structure**

TEAM LEADERSHIP

**Compelling
Purpose**

**Supportive
Context**

THE
ENABLERS

Team Coaching

ITHS | Inst ACC

Team Diagnostic Survey
6 Conditions for Team Effectiveness

3
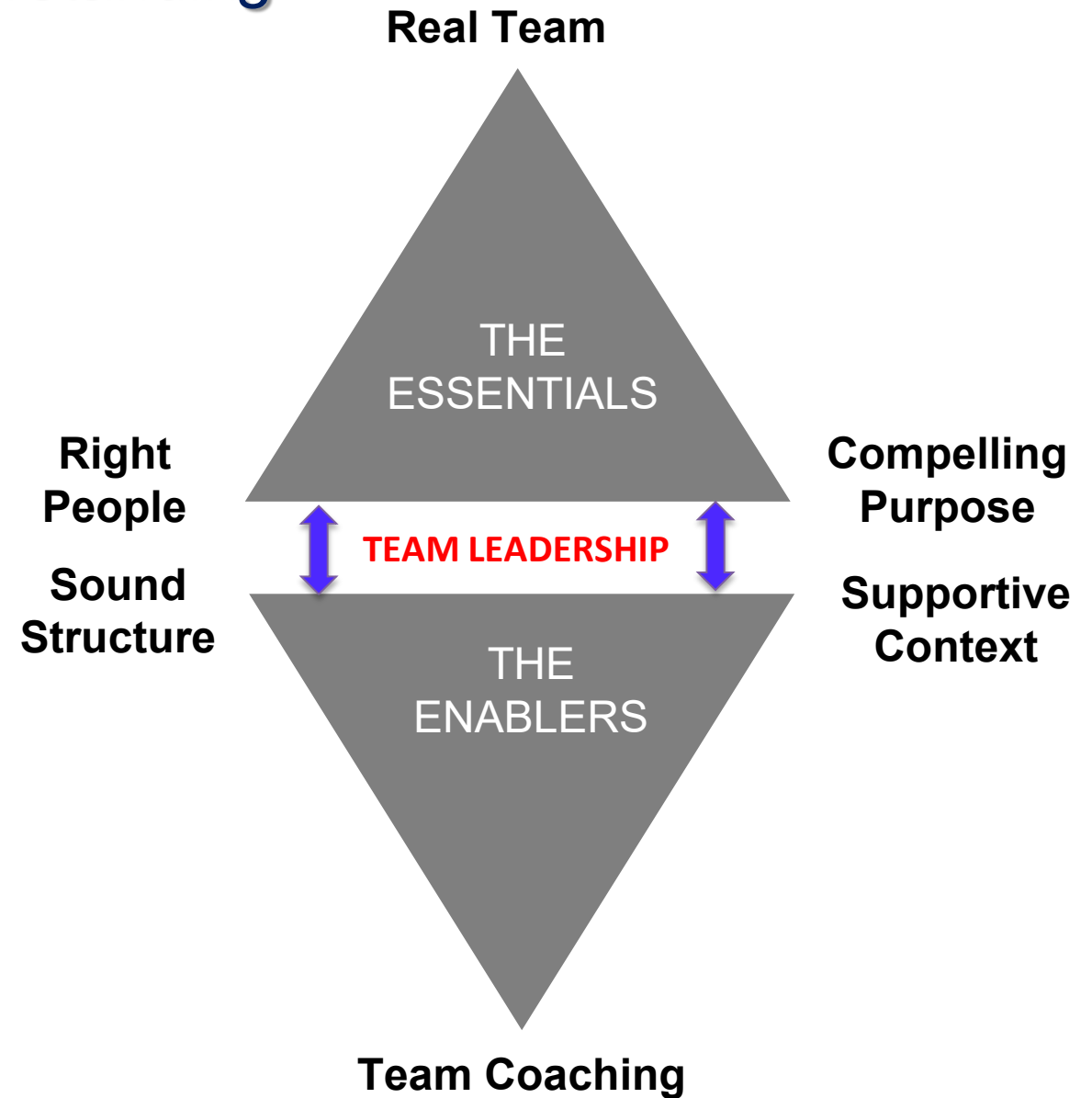
Learning Objectives

1. Construct a team charter & apply team process tools

2. Develop goal alignment through clear objectives

3. Establish & update team member's roles & responsibilities

4. Begin to apply project planning & 3 of the 6 Conditions

ITHS | Institute of Translational Health Sciences
ACCELERATING RESEARCH. IMPROVING HEALTH.

Project Charters

What's your plan?

Based on concepts within:

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

ITHS | Institute of Translational Health Sciences
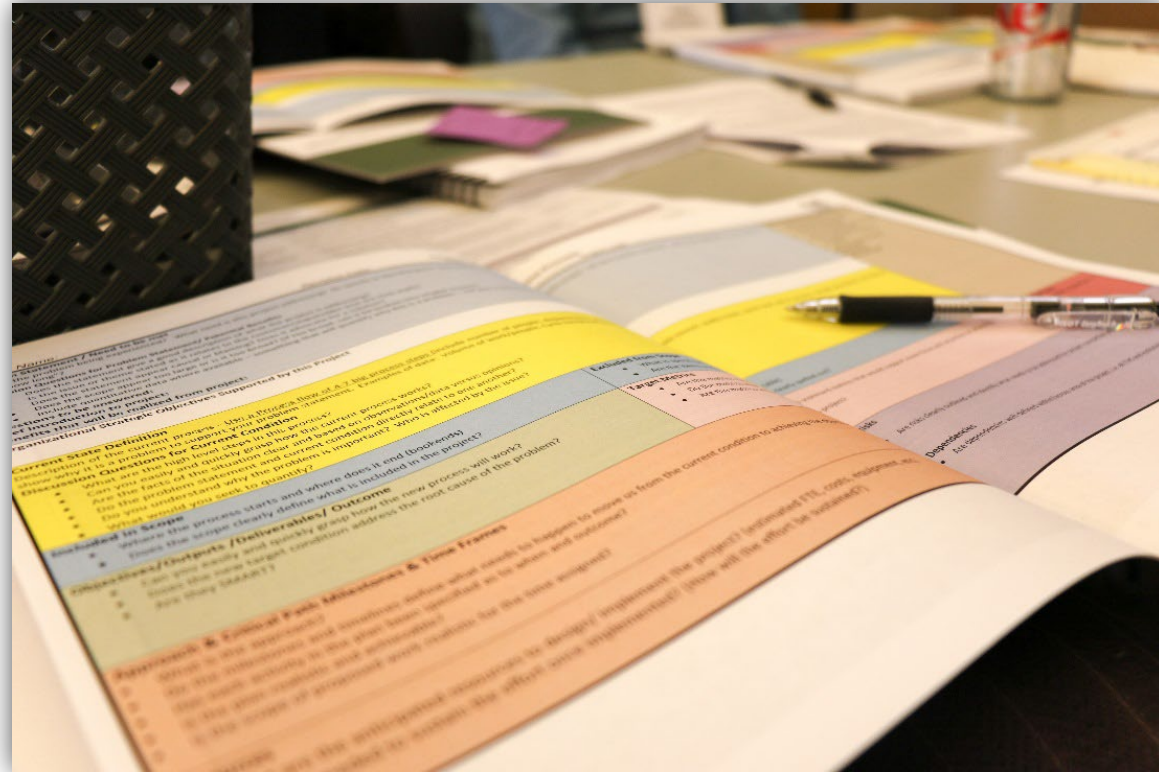ACCELERATING RESEARCH. IMPROVING HEALTH.

5

Charter

► Compelling: reason for being, value from project

► Purpose: objectives & aims in common language

► Who should be on the team

► Evaluation: defines objectives more clearly

► Clarity of roles

► Project plan: milestones & more

► Risks & challenges/dependencies

ITHS | Institute of Translational Health Sciences
ACCELERATING RESEARCH. IMPROVING HEALTH.

The Charter

ALL IN 1 LOCATION

- ► Facilitator Copy
- ► Blank Copy

Clarifying the Objective

PROJECT CHARTER SECTION A, C, F, G, H – PROBLEM STATEMENT

► What problem is your project addressing?

► What are the benefits of addressing it?

► What are the objectives of your project?

► Alignment to sponsor objectives

► Objectives & deliverables

► In and out of scope

► Evaluation- does it work?

ITHS | Institute of Translational Health Sciences
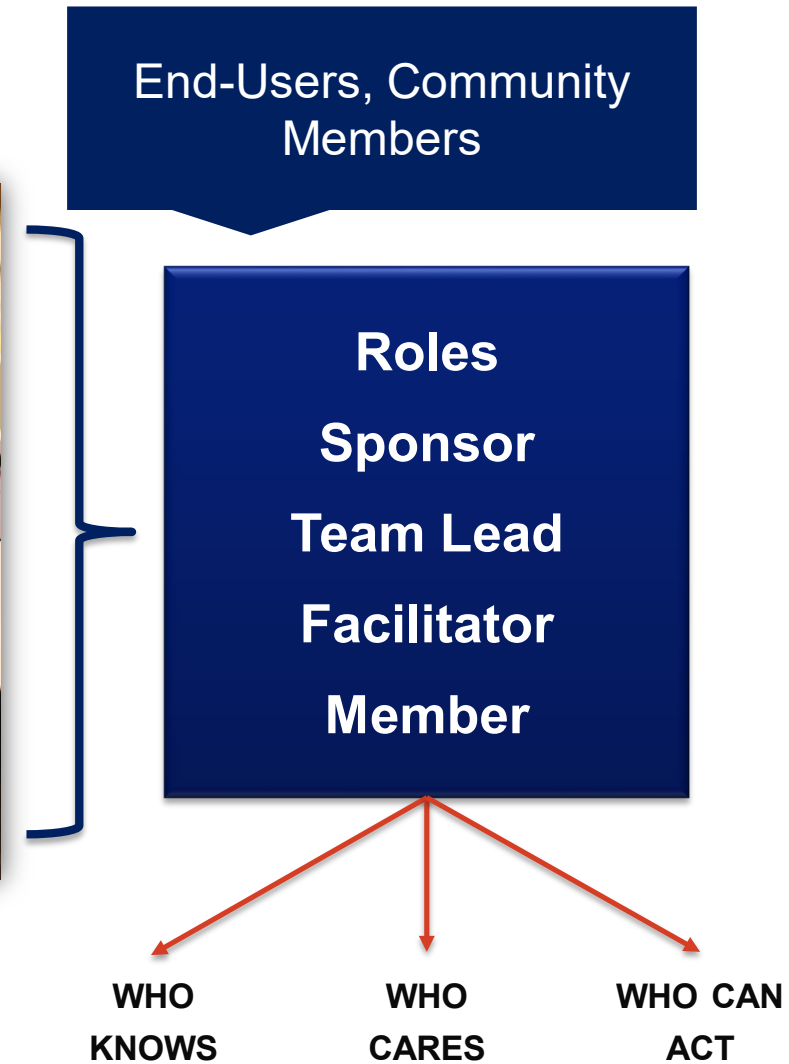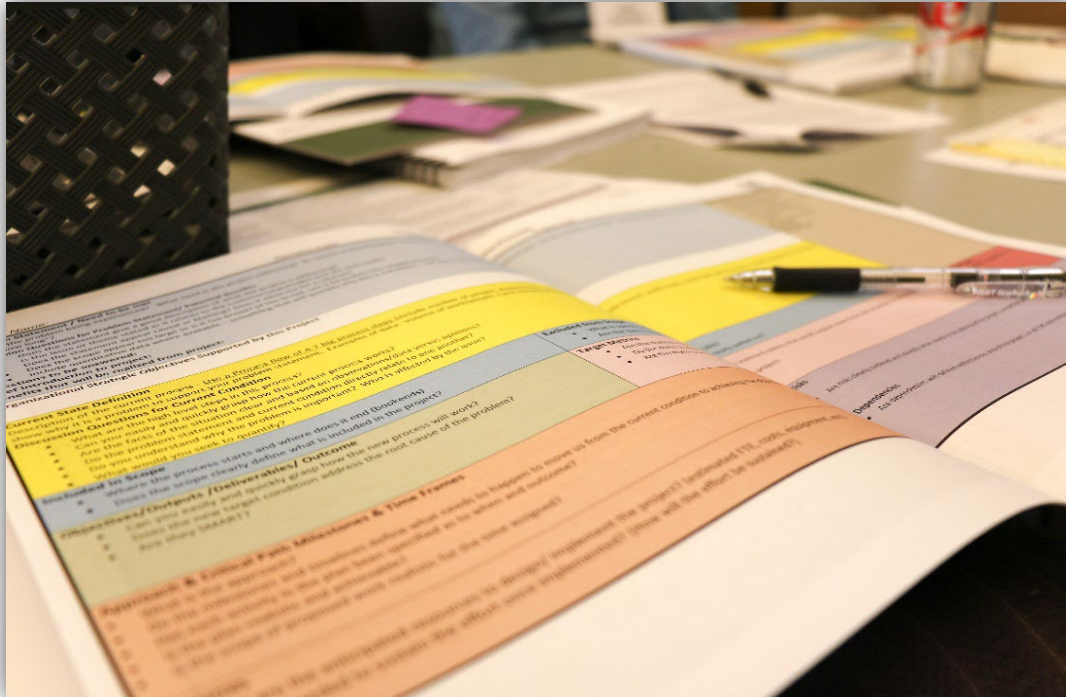ACCELERATING RESEARCH. IMPROVING HEALTH.

Team Exercise – Clarify the Objective

BREAKOUT ROOMS; 20 MINUTES

► Complete Charter sections A, C, F, G

► Use the Charter form or a separate sheet

► Remember: to promote equal speaking time:

  ▪ Promote equal speaking time (i.e., share the floor, 1 thought at a time, allow 1-3 responses before adding more)

  ▪ Keep your responses brief – think elevator pitch

  ▪ All of the team has a common understanding

ITHS | Institute of Translational Health Sciences
ACCELERATING RESEARCH. IMPROVING HEALTH.

The Team

PROJECT CHARTER SECTION B & D

End-Users, Community Members

Roles

Sponsor

Team Lead

Facilitator

Member

WHO KNOWS

WHO CARES

WHO CAN ACT

Roles and Responsibilities

XX Project Roles Updated 1/10/2020

Sub-.Team	Person/Contact	Role	Meetings Attending/ Volunteer roles	Expertise	Ethics & Research training Certificate Date- Expiration Date	FTE Yr 1
Overall Project	Dddd dd@xx.com	• PI • Identify article possibilities and authorship of each article • Manage and allocate budget in compliance with contract	DRG- lead Test Strip Application Summary Project Planning meeting All Team- lead Lead	Patient centered research Global research	4/1/20- no expiration	.3
Overall Project	BB bb@xx.com	• Build platform for project planning • Work with members to identify activities and create milestones • Facilitate all team meetings • Schedule all team and clinical meetings • Address project planning and execution issues as arise • Clarify roles, responsibilities and work to ensure responsibilities match FTE	Project planning meeting All Team-facilitator	Project management Facilitation Planning Consensus building	N/A	.05

ITHS | **Institute of Translational Health Sciences**
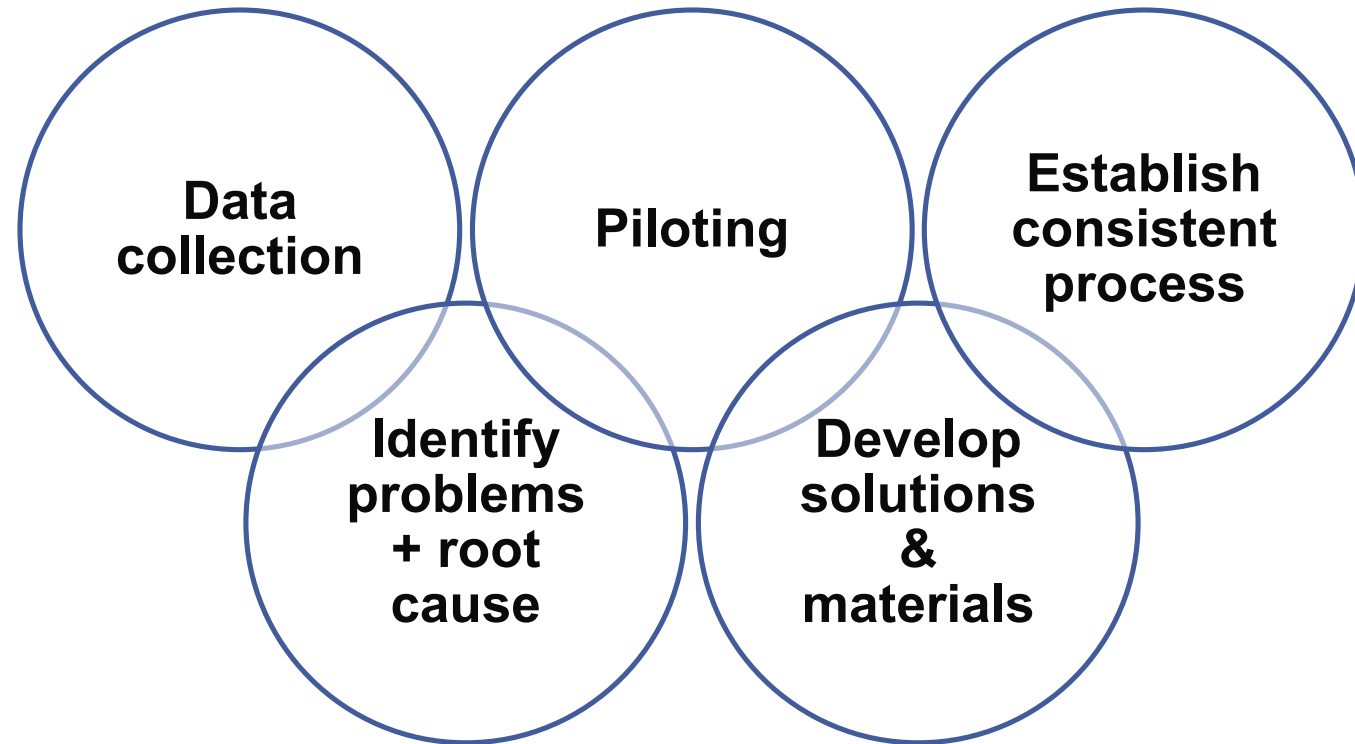ACCELERATING RESEARCH. IMPROVING HEALTH.

Team Exercise

BREAKOUT ROOMS; 15 MINUTES

► Complete Charter sections B, D & Roles document

► Utilize Charter form or a separate sheet & Roles tool

Charter – Creating the project plan
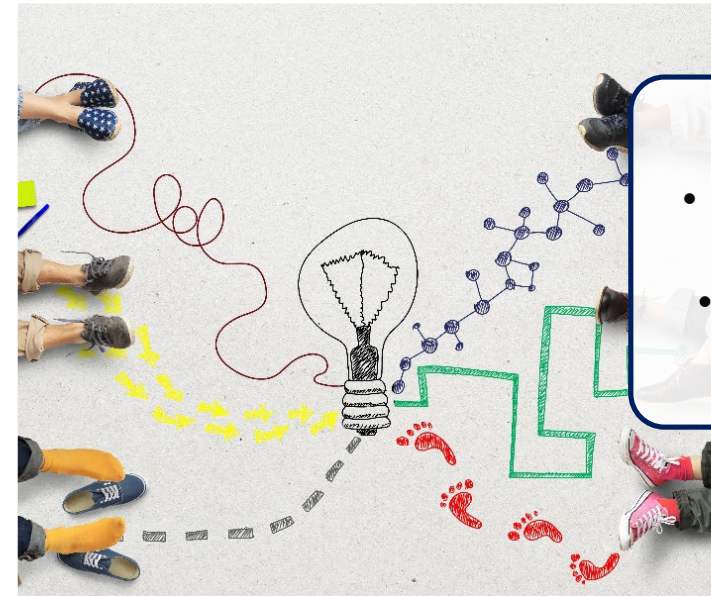
What is the process to reach your objectives?

Data collection

Piloting

Establish consistent process

Identify problems + root cause

Develop solutions & materials

Tools

Flowcharting

Brainstorming

- Contribute
- Clarify
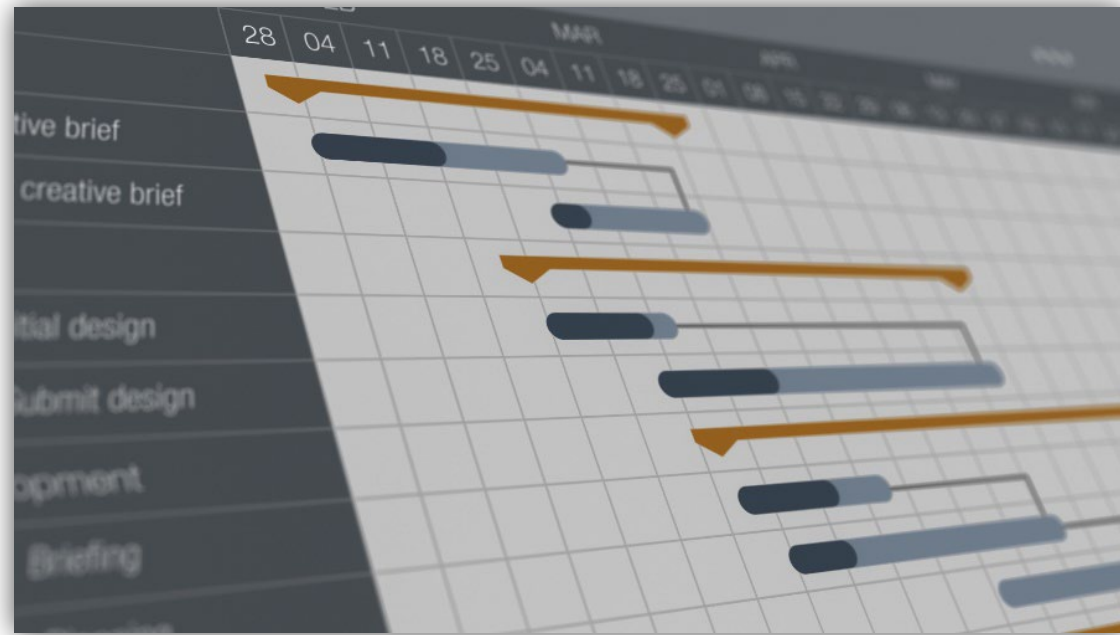- Evaluate

Team Exercise – Project flow chart

BREAKOUT ROOMS; 20 MINUTES

► Use Post-it note flowcharting to map out one deliverable or aim

- Starting point/ending point
- Brainstorm steps
- Place them in order
- Add timing

► Remember the rules of brainstorming:

- Contribute
- Clarify
- Evaluate

ITHS | Institute of Translational Health Sciences
ACCELERATING RESEARCH. IMPROVING HEALTH.

Work Plan- moving from post it notes

- ► Calendar
- ► Word
- ► Excel
- ► Smartsheet

ITHS | Institute of Translational Health Sciences
ACCELERATING RESEARCH. IMPROVING HEALTH.

Adding to your plan

► Risks
► Challenges
► Dependencies

Identify and mitigate

Preparation for Tomorrow

PREWORK

► Review your 3 self-assessment results:

  ► Social Style Self-Perception Profile (see email from TRACOM)

  ► Thomas Kilmann Conflict Mode
    at https://Elevate.themyersbriggs.com/Respondent/ReturningUser?tokenId=2c309443-0d98-ed11-a8de-000d3a36c7a5

  ► Emotional Intelligence Questionnaire at https://collaborate.uw.edu/wp-content/uploads/2021/01/TS_BC_2021_Emotional_intelligence_questionnaire.pdf

► Read or listen to "What Does Modern Prejudice Look Like?" at
https://www.npr.org/transcripts/177455764

Additional Resources

► ITHS Career Development Series (CDS) trainings include:

    ► Team Science Seminar Series (listed below)

Title	Date	Presenter	Event Page Link
Introduction to the Team Science Seminar Series 2022-2023: Why is Team Science Important?	6-Oct-22	Erin Blakeney	https://www.iths.org/event/introduction-to-the-team-science-seminar-series-2022-2023-why-is-team-science-important/
Building Self-Awareness and Leadership Traits for Team Effectiveness	3-Nov-22	Brenda Zierler	https://www.iths.org/event/building-self-awareness-and-leadership-traits-for-team-effectiveness/
Setting the Foundation for Successful Meeting Management	1-Dec-22	Jennifer Sprecher	https://www.iths.org/event/successful-meeting-management/
Building an Interdisciplinary Research Team	5-Jan-23	Brenda Zierler	https://www.iths.org/event/building-and-sustaining-your-interdisciplinary-research-team/
Growth Mindset & Giving and Receiving Feedback	2-Feb-23	Michael Johnson	https://www.iths.org/event/growth-mindset-and-giving-receiving-feedback/
Leading with Intention: Foundational Skills for Handling Interpersonal Conflict	2-Mar-23	Sara Kim	https://www.iths.org/event/handling-interpersonal-conflict/
Creating engagement: Facilitation from Chaos to Construct	6-Apr-23	TBD	Coming soon
Multiple-PI Collaborative Grant Applications	27-Apr-23	Panel	Coming Soon
Diversity, Equity, and Inclusion in Team-Based Research	4-May-23	TBD	Coming soon
Engaging Communities in Interdisciplinary Research	1-Jun-23	TBD	Coming soon

ITHS | Institute of Translational Health Sciences
ACCELERATING RESEARCH. IMPROVING HEALTH.

Team Time

CHARTER

► Charter:

- Objective of your team:
- What problem is your project addressing?
- What are the benefits of addressing it?
- What are the objectives of your project?

► Team Roles:

- Are there sub-committees?
- Are certain members responsible for certain areas?
- What is the FTE allocated?
- Do you have community members present?

► Complete other areas of charter

ITHS | Institute of Translational Health Sciences
ACCELERATING RESEARCH. IMPROVING HEALTH.

Team Time

► You can request a Team Science facilitator to join your team's breakout room for coaching or questions about your project

► At the bottom of your Zoom toolbar, click on "Breakout Rooms"

► Click on "Ask for Help" and then "Invite Host"

► One of the facilitators will join your room