What is the Team Science Seminar Series?

Overall Goal: Assist researchers in addressing challenges to collaboration & collective team functioning, improving their ability to lead interdisciplinary teams, communicate & build trust with their collaborators, & identify the best ways to solve problems collaboratively.

Target Audience: Early career faculty, pre- and post-docs, and professional research staff

Design Principles (informed by adult learning theory):

- Goal oriented content (tied to Team Science Competencies)

- Balance of didactic & interactive content to facilitate immediate application

- Provide additional resources for self-directed learning

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ITHS TEAM SCIENCE CORE

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Director of Strategic Development
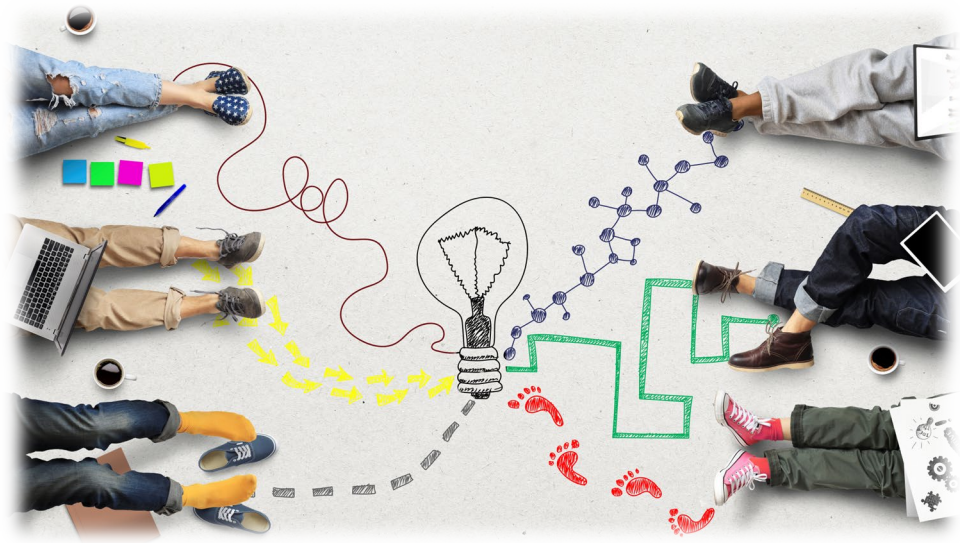& Deployment

2023-2024 TEAM SCIENCE SEMINAR SERIES SCHEDULE

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1/4/24	Tools for Collaboration	6/6/2024	Biases, Microaggressions, and Specific Challenges
2/1/2024	Strategies to Address Conflict	TBD	Leadership/ Delegation

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Learning Objectives

AT THE END OF THIS SEMINAR, PARTICIPANTS WILL BE ABLE TO:

1) Describe ways in which kick-off materials can support team success

2) Identify and adapt kick-off tools to support the team

3) Practice activities that can successfully help kick-off your team

Plan for the Day

- Why Kick-offs are Useful

- Prior to Kick-offs

- During Kick-offs

- After Kick-offs

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Why are Kick-Offs Useful?

Opportunity to:

- Celebrate New Project/Funding/Team

- Orient/Re-Orient Team to Project Purpose & Approach

- Actively Engage Team Members with the Project, their Role, & Each Other

- Discuss and Plan How to Work Together (e.g. Team Agreements, Communication Plan, Milestones/Timelines, File Sharing/Access)

- Identify & Constructively Address Questions, Concerns, Changes

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Prior to Kick-Off

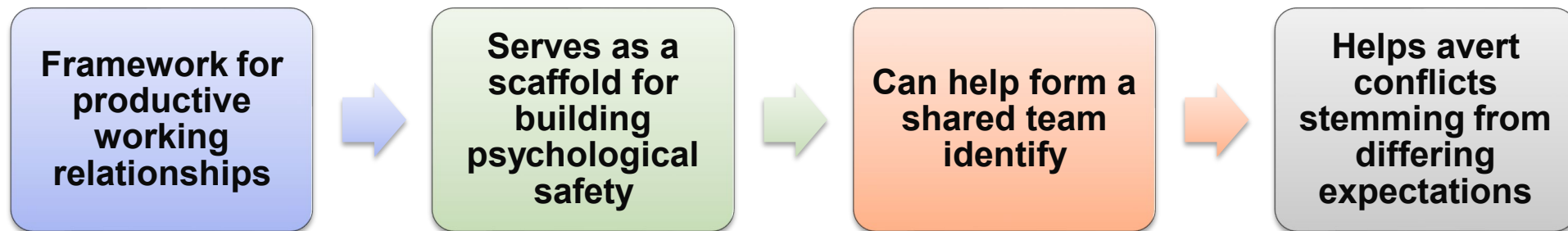**Establish file sharing & communication approach**

- Grant Aims & Plan (consider putting into charter format)

- Onboarding/Training Materials (e.g. past papers, human subjects training, how to get an ID, etc.)

- Email lists

- Access for team members (i.e. to OneDrive, EPIC, REDCap, etc.)

Create and send team welcome letter

- Brief, engaging overview of grant, contact information, protocols (e.g. authorship)

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Team Welcome Letters

► Provides a roadmap for new teams and new team members

► Should be considered a living document

Framework for productive working relationships	→	Serves as a scaffold for building psychological safety	→	Can help form a shared team identify	→	Helps avert conflicts stemming from differing expectations

Team Welcome Letters

POTENTIAL CATEGORIES TO ADDRESS:

▶ Goals of collaboration

▶ Team agreements

▶ Expectations & accountability

▶ Authorship & credit

▶ Contingencies

▶ Communication

▶ Conflicts of interest

The 'Welcome Letter': A Useful Tool for Laboratories and Teams

L. Michelle Bennett[1,*], **Richard Maraia**[2], and **Howard Gadlin**[3]

[1]Division of Intramural Research, NHLBI, NIH, 10 Center Drive, Bethesda Maryland, USA

[2]Intramural Research Program, Eunice Kennedy Shriver National Institute of Child Health and Human Development National Institutes of Health, USA

[3]Center for Cooperative Resolution, OD, NIH, 31 Center Drive, Bethesda Maryland, USA

Abstract

The ability to clearly set expectations is an important leadership characteristic. However it is very common for individuals heading up research laboratories or scientific collaborations to struggle with, or not identify the advantages of, explicitly communicating what they expect of the people working in their lab or participating on their team, not to mention what the participants can expect in return. Here we describe a 'Welcome Letter' as a tool that can be used in the scientific setting to effectively create a framework for working relationships and serve as a scaffold for building trust. The 'Welcome Letter' enables the lab leader to articulate expectations prior to incorporating new members into the group. Scientific teams can use the letter in much the same way, crafting it together to develop a shared vision for the functioning of the collaboration and once crafted, sharing it with new team members.

Keywords

Setting expectations; Team science; Collaboration; Laboratory management

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Author Manuscript

Welcome Letter Resources & Examples

1) Bennett, L. M., Maraia, R., & Gadlin, H. (2014). The 'Welcome Letter': A Useful Tool for Laboratories and Teams. *Journal of Translational Medicine & Epidemiology*, *2*(2). Retrieved from https://www.ncbi.nlm.nih.gov/pmc/articles/PMC5479682/

2) University of Minnesota Office for Conflict Resolution (example welcome letters): http://ocr.umn.edu/resources/resources-research-teams

3) NIH Office of the Ombudsman (questions for collaborators): https://ombudsman.nih.gov/sites/default/files/Revised%20Partnering%20Agreement%20Template.pdf

4) UW CHSIE Team Writing Toolkit: https://collaborate.uw.edu/ip-team-writing-toolkit/

Planning Kick-Off

- **Who:** Identify attendee list (any role vs. specific roles/groups?)

- **What:** Develop agenda & clarify purpose of kick-off

- **Where:** Decide whether in-person, virtual, hybrid

- **When:** Determine length of meeting & when to hold (many people need long lead times to be able to join, especially if travel involved)

- **How:** Internal vs. External Facilitator?, Budget for space, food, travel, time, etc.? Materials needed at kick-off?

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EXAMPLE KICK-OFF AGENDAS

90 Minute Virtual Kick-Off	2-Day Hybrid Kick-Off	
• Welcome & check-in (10 mins) • TRIZ activity to Develop Team Agreements (20 mins) • Review & Discuss Project Charter (20 mins) • Break (5 mins) • Developing Your Team's Communication Plan (25 mins) • Identification of Next Steps & Wrap-Up (10 mins)	Day 1: • Breakfast & Welcome (30 mins) • Introductions & Team Building Activity (60 mins) • Topic 1 (30 mins) • Topic 2 (30 mins) • Topic 3 (30 mins) • Study Overview, Challenges, & Opportunities (60 mins) • Lunch (60 mins) • Topic 4 (30 mins) • Topic 5 (30 mins) • Break (5 mins) • Topic 6 (45 mins) • Reflection & takeaways (60 mins) • Group Dinner	Day 2: • Breakfast (30 mins) • Topic 7 (60 mins) • Break (15 mins) • Reflection & discussion (individual, small group, large group report back) (75 mins) • Lunch (60 mins) • Brainstorming new study name (Jamboard) (30 mins) • Parallel brainstorming sessions on 3 topics (small groups 75 mins; report back 45 mins) • Reflections, wrap-up, next steps (90 mins)

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Activity: Liberating Structures: *Impromptu Networking*

How it works:

- You will be randomly assigned to a breakout room with 2-3 members

- Answer the prompts below (~6 mins total). Make sure everyone has a chance to answer & discuss the prompt.

- Repeat!

> **1. Introduce yourself**
> **2. What thoughts & questions do you have about kick-offs so far?**
> **3. Have you been to a kick-off in the past? If yes, what was it like & how did it influence the project? If no, are there projects where you think it would have been useful to have a kick-off? How & why?**

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INTRODUCTIONS

- 3 minute slide with expertise, role on project and favorite past time

- Why were you named your name

- Passion Card- what makes you passionate about this project

- Impromptu networking (liberating structures.com)- what do you hope to get from this project, what do you plan to give

- Appreciative interviews (liberating structures.com)

- Icebreaker questions*

- Personal styles and conflict mode

- Truth and False Game

*See Reference sites

TEAM NORMS

- Everyone has post its or use software like jamboard or Trello

- Capture ideas on what people would like to see as norms

- Ask group to move ideas to categories

- Review categories- identify those that all agree as norms

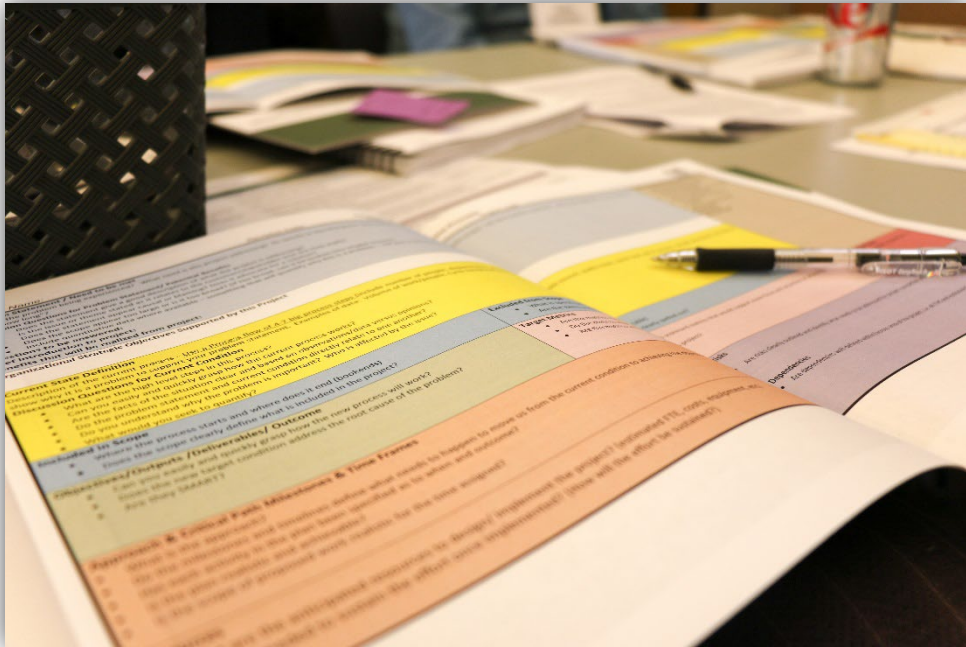- Discuss those that have differing opinions

Project Charter -Goals & Evaluation

BASED ON CONCEPTS WITHIN:

► Project Management Institute

► Continuous Improvement (PDSA)

► Theories of Change Management

Right People

Compelling purpose—
Defining the need and success

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PROJECT CHARTER

Handout: facilitator copy and blank copy

► What problem or issue is your project addressing?

► What are the benefits of addressing this issue?

► What are the objectives of your project?

PROJECT PLAN

► Data collection

► Identification of problems, root causes

► Development of solutions, materials

► Piloting

► Establishing a consistent ongoing process

   ▪ Process Flow Charting

Software

Project Charter - Project Plan
What is the Process to Reach your Objective

CONSIDERATIONS:

► Data collection

► Identification of problems, root causes

► Development of solutions, materials

► Piloting

► Establishing a consistent ongoing process

- Process Flow Charting

TEAM MEMBER ROLES

- Name

- Contact

- Team role

- Area of expertise

- Training, certifications required

- FTE year 1

- Subteam membership

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

After the Kick-Off

- Thank you email or note

- Summary of what occurred

- Updated materials

- Clarifications of upcoming meetings and next steps

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REFERENCES

Icebreakers:

Martins, Julie. "110+ Icebreaker Questions for Team Building." *Asana.Com*, 9 Jan. 2023, Accessed 25 Oct. 2023.

Hill, Carly . "Icebreaker Questions for Work: The #1 List in 2023." *Teambuilding.Com*, 11 May 2023, teambuilding.com/blog/icebreaker-questions. Accessed 25 Oct. 2023.

Project Management Institute:
https://www.pmi.org/pmbok-guide-standards

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Debrief/Wrap-Up

► Please provide feedback on today's session!

    ► Feedback in chat

    ► Complete Today's Session Evaluation

► Next month's session:

    ► Team-Based Writing

    ► Thurs 12/7/23 12:00pm-1:00pm

    ► Registration is live

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