



INNOVATE
UNIVERSITY OF KENTUCKY RESEARCH

Managing Hybrid Teams to Optimize Grant Proposal and Project Success



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My Complex Team Management Experience

60+

People hired in interdisciplinary organizations

100+

Multi-party transactions and projects

9

State and Federal grants as PI or Co-I

100%

Of those grants are multi-party

\$35.21M

Grant dollars awarded

\$12.42M

Of those grant dollars to UK

What is Project Management?

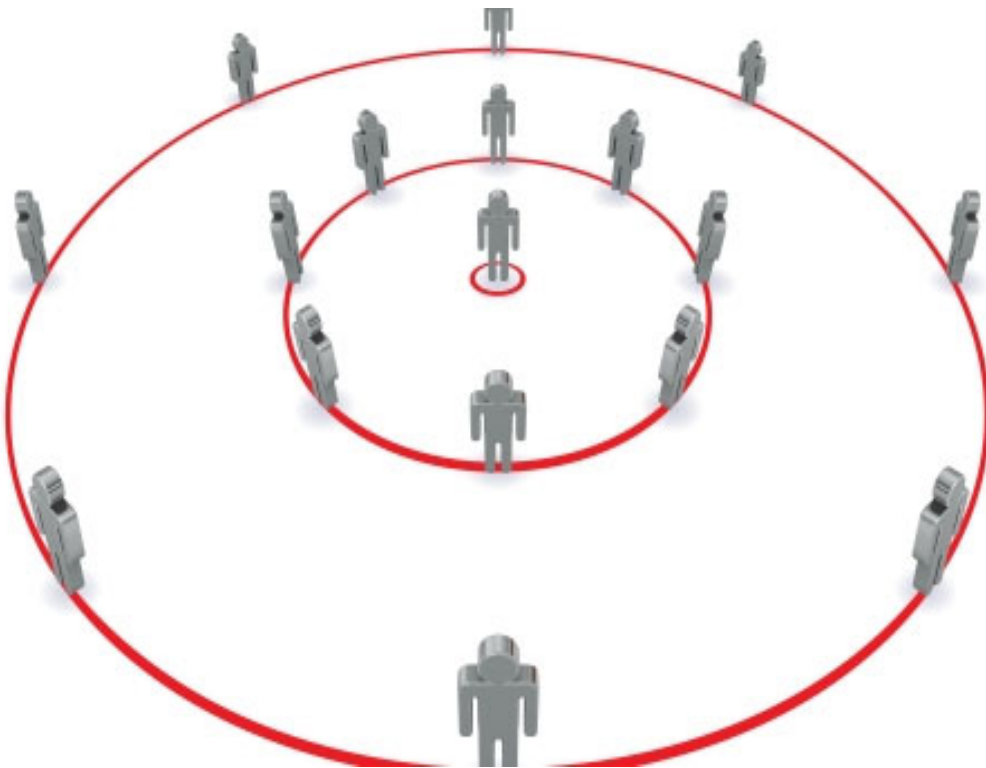
1. People
2. Process
3. Communication
4. Accountability



People

PEOPLE: TEAM BUILDING

The Tent and the Circus



- Map Capabilities to People (see Process)
- Develop motivational terminology for different “circles”
- Core or Leadership Team, or “Champions”
- Partners (create categories if partner circle is too large or verticals are multiple)
- Before individual roles are defined, create cadence and messaging for overarching importance of each “circle”

PEOPLE: TEAM BUILDING

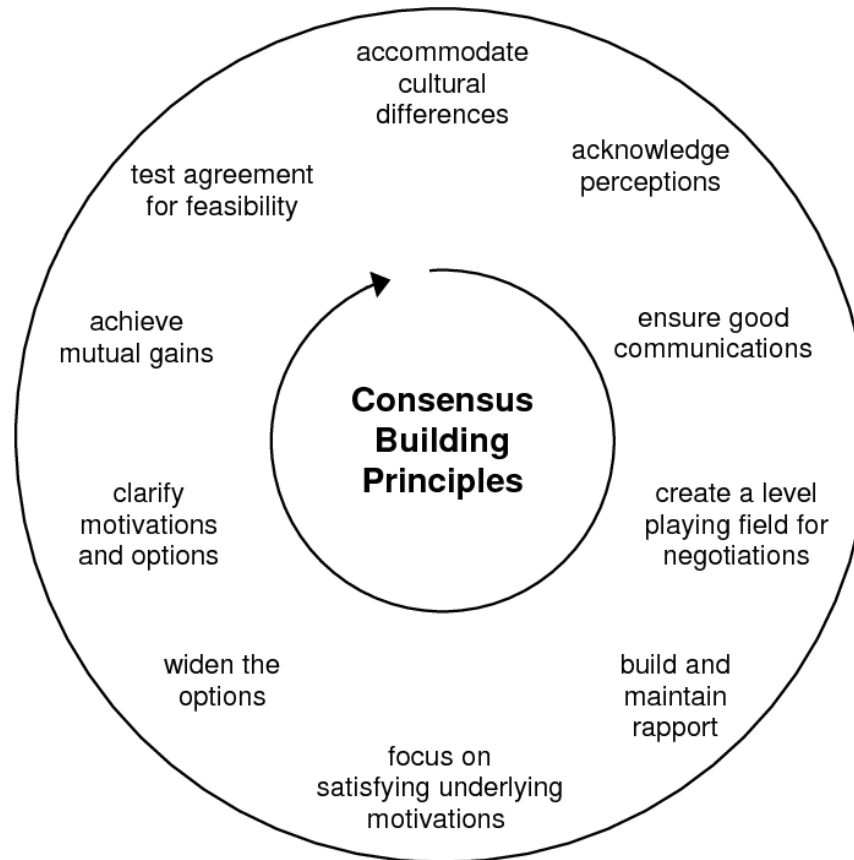
The Role of “Champions”



- When organizations need to be represented rather than a person
- Point of contact (but much more than that)
- They carry the torch for you
- 1-1 cadence needed
- Equip them

PEOPLE: THE IDEATION PROCESS

Voluntary Consensus Building



MCRC principles of consensus building presented as a

PEOPLE: THE IDEATION PROCESS

Voluntary Consensus Building

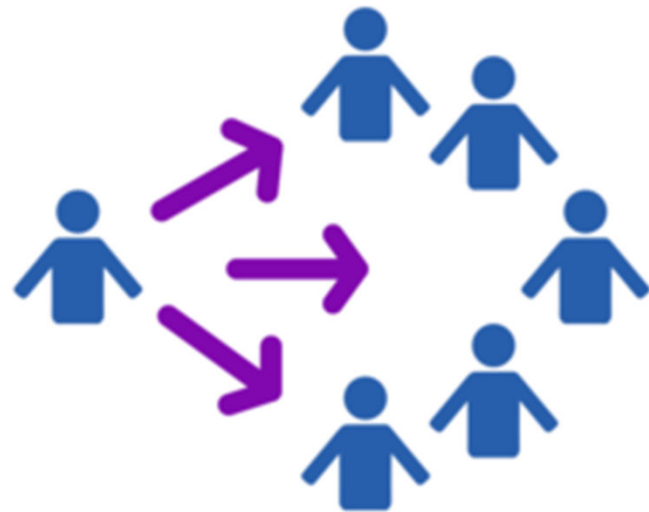
Step 1



1 on 1



Step 2



1 to many

PEOPLE: THE IDEATION PROCESS

Voluntary Consensus Building

The art of the first group meeting



1. Be the one to initiate and schedule it, and send the calendar invite.
2. Group email, acknowledging “as I have discussed with each of you”.
3. Don’t call it a presentation or meeting – call it a “Workshop”, “Roundtable”, or “Feedback Session”
4. Send an agenda, but have a time on the agenda clearly marked for “Open Discussion” or “Ideation”
5. Have materials ready to present, but clearly mark them “draft” and loudly message that they are “live working drafts for discussion purposes only”

PEOPLE: THE MANAGEMENT PROCESS

Communication Protocols

The information collection and the follow up



1. “Hi” and “Please let me know . . .” (the most important communication protocols)
2. Build a contact information database
3. Send materials (marked “DRAFT”)
4. Send follow-up with (1) takeaways, (2) Action Items (clearly assigned), and (3) timeline.
5. Give Credit and Praise

PEOPLE: THE MANAGEMENT PROCESS

Voluntary Consensus Building

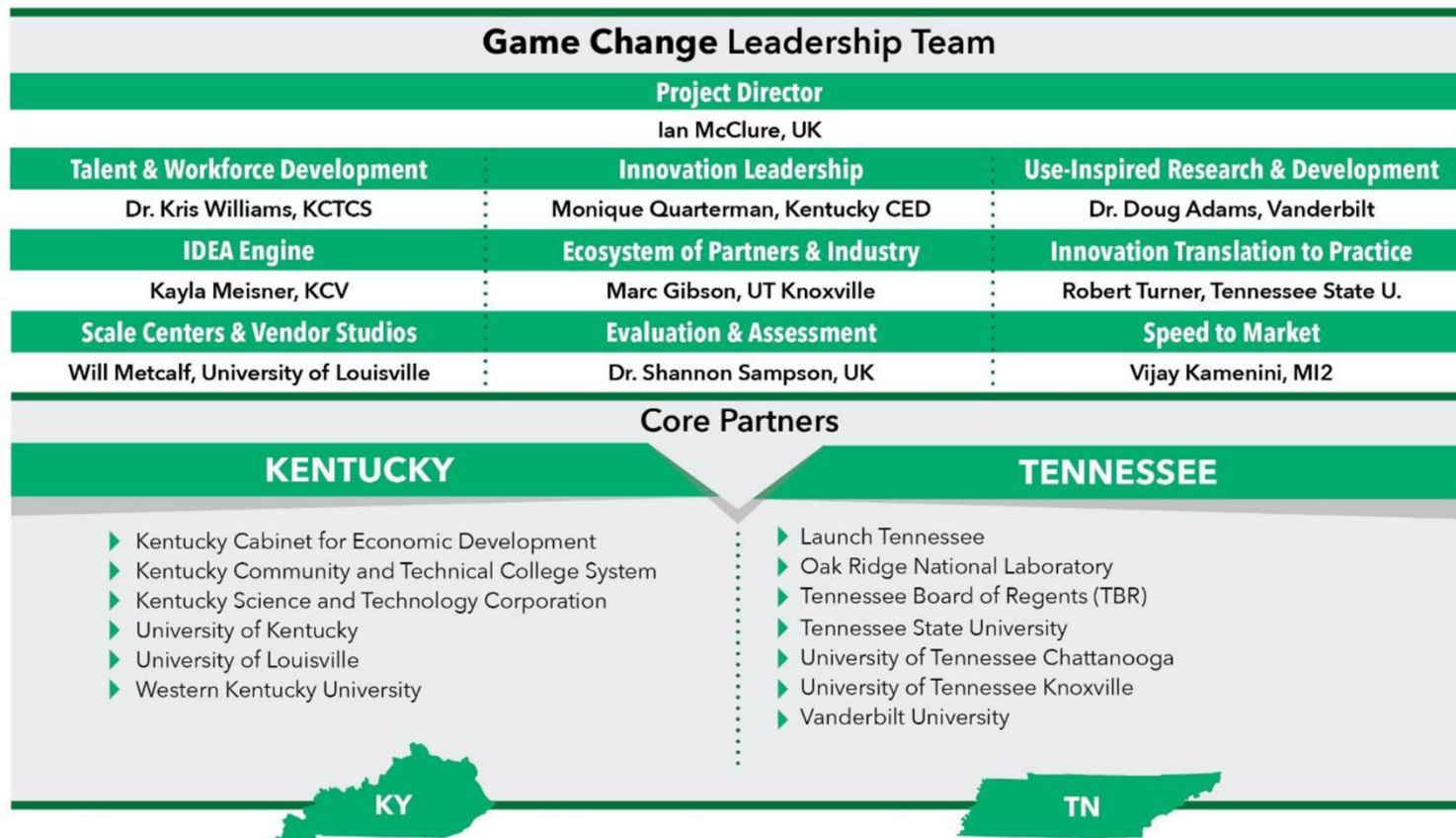
Build A Motivated Leadership Team



1. Create “Workgroups” and designate “leads”
2. They each carry a “Flag” for the core goal/function of the project
3. Minimize control loss by creating a regular cadence for feedback loops from their “workgroup” – **to you**
4. You curate the feedback, and bring it to the group

PEOPLE: TEAM BUILDING

Distributing Motivated Leadership Example



PEOPLE: TEAM BUILDING

Distributing Motivated Leadership

If Functions Don't Work, Identify "Themes"

Figure 5.
GAME Change
NSF Regional Innovation Engine



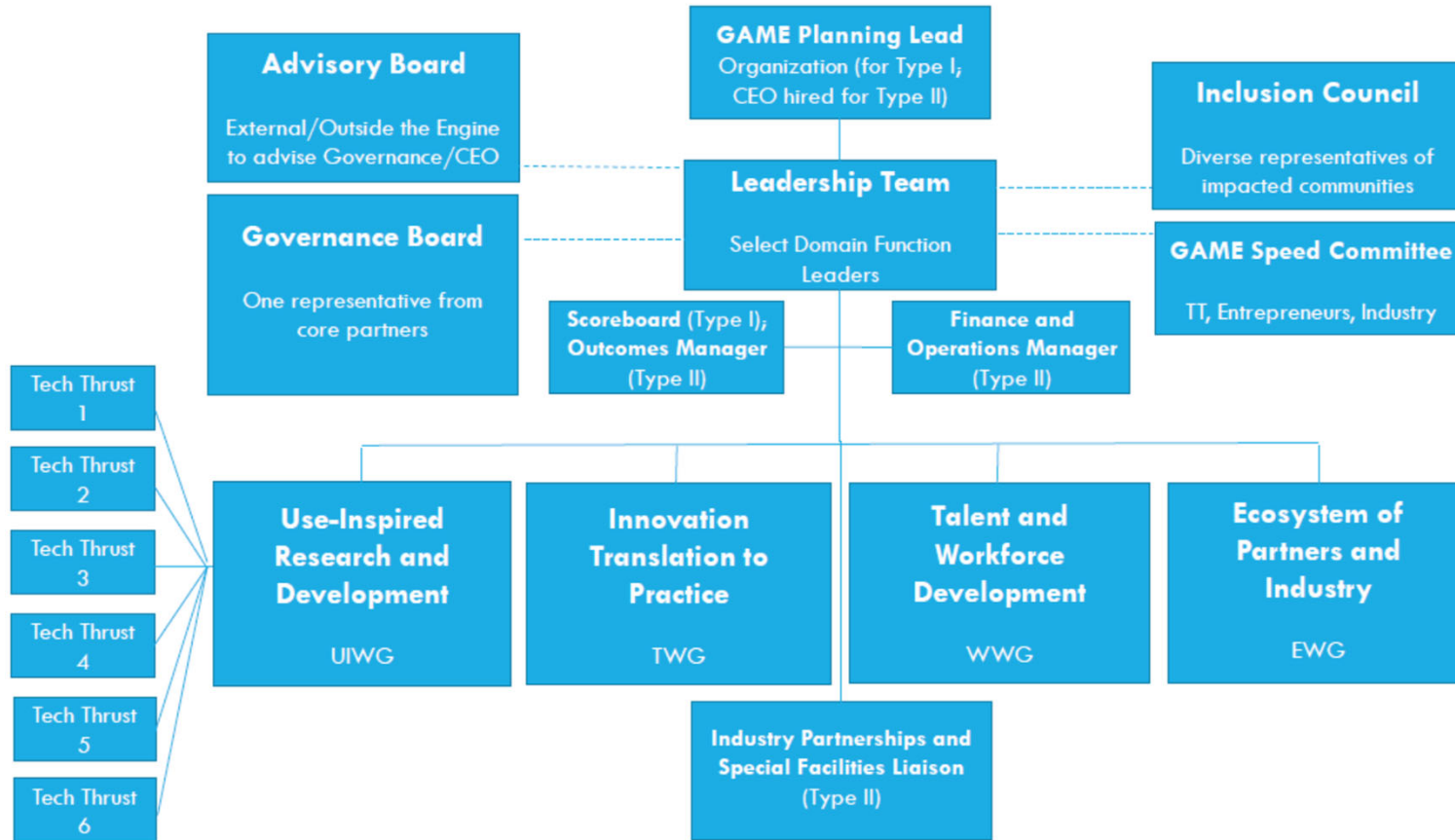
PEOPLE: INCLUSION

Ensure Inclusive Perspective, Participation, & Benefits

1. Recognize that perspective (broad input), participation (project team/partners), and benefits (impact) are different
2. Build intentional mechanisms to ensure EDI is a theme and not a checkbox
 - a. An EDI Goal
 - b. “Inclusion Council” with direct line to Leadership Team
 - c. “Inclusion Anchors”
 - d. Inclusion budget
 - e. EDI metrics

PEOPLE: ORGANIZATIONAL DEVELOPMENT

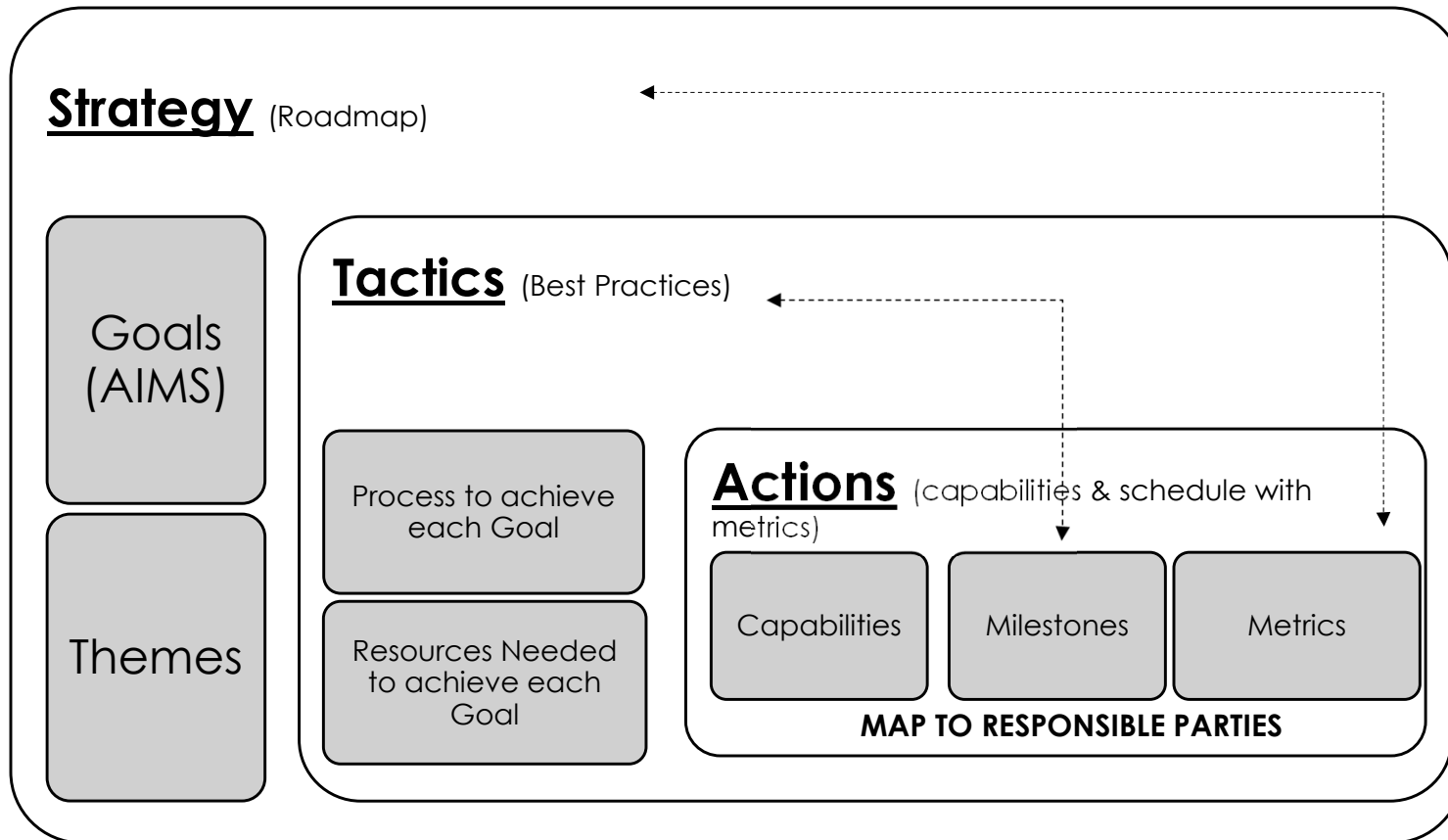
Have an org chart



Process

PROCESS: THE PLANNING

Getting to “Capabilities Mapping”

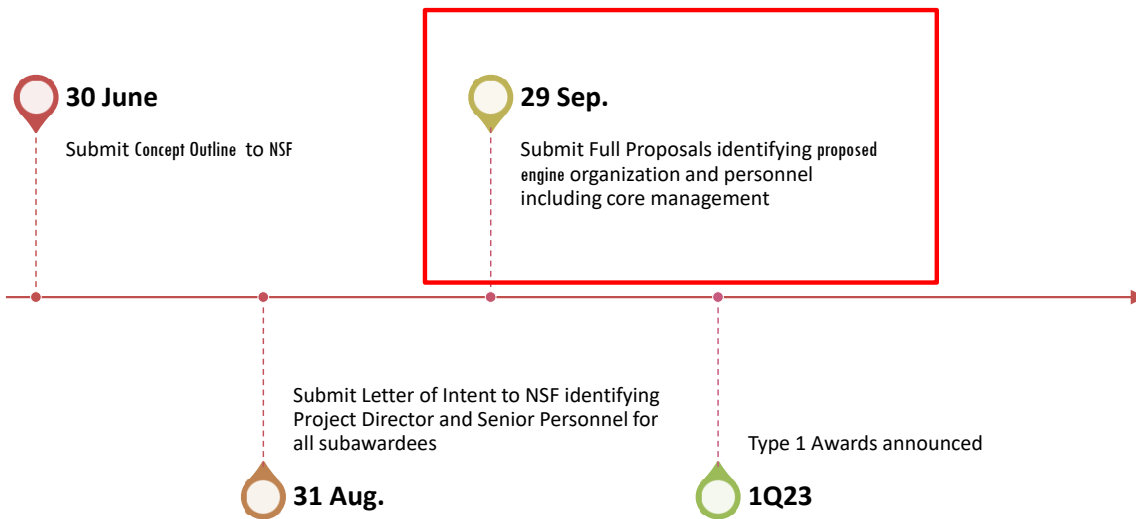


PROCESS: THE EXECUTION

Milestones and Timeline

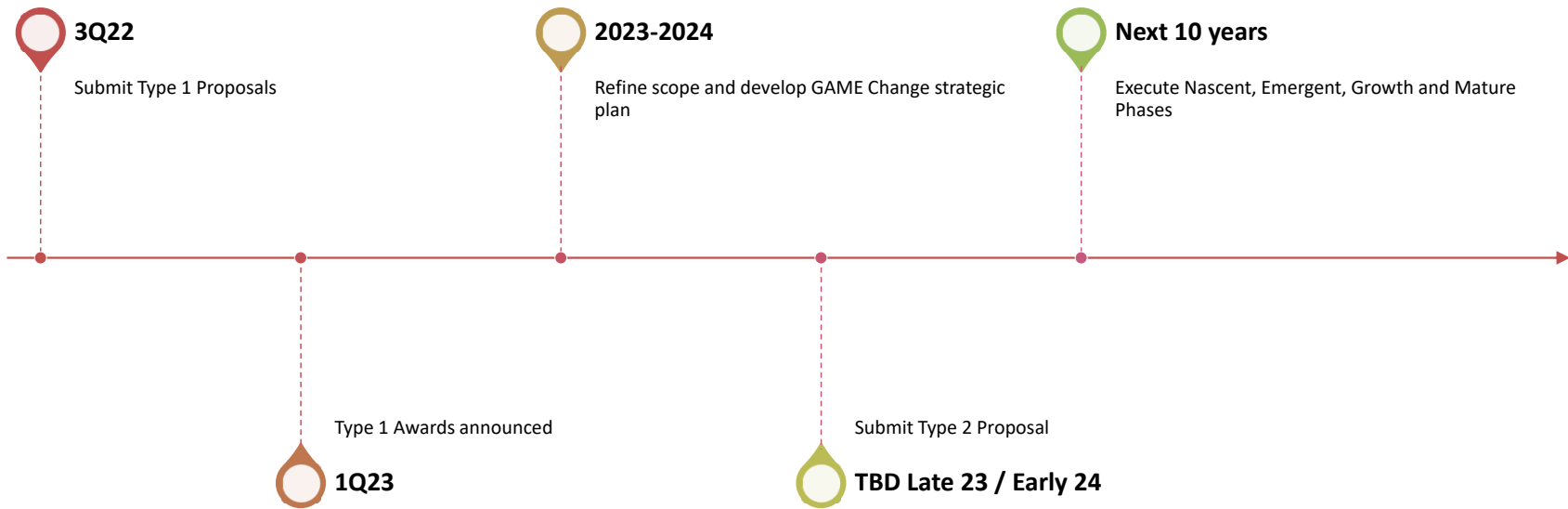
- Create repeatable graphic for “checklist”
- Routinely update group on progress against milestones
- Celebrate the “Wins” as they come with full-group praise

Near-Term Timeline



- Recurring bi-weekly Core Partner Meetings
- Recurring opposite bi-weekly KY and TN partner meetings
- Recurring bi-weekly Industry Recruitment Committee meetings

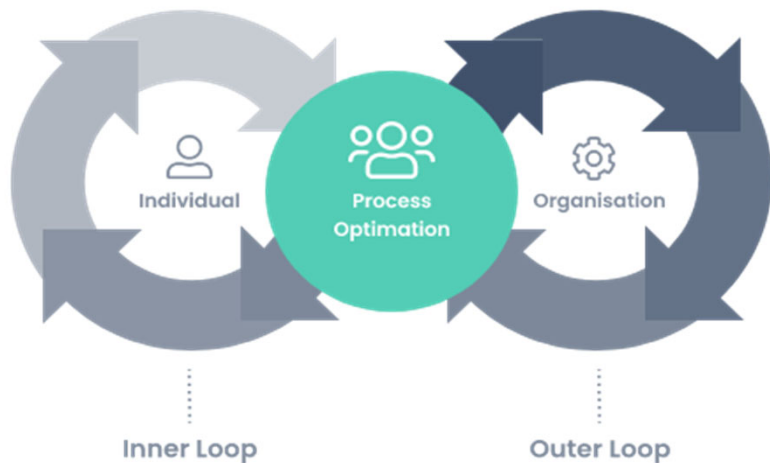
Long-Term Timeline



PROCESS: THE EXECUTION

Feedback Loop

Check-ins and Opportunities for Presentation



1. Creating “Workgroups” means separating workstreams - **assign work product with due dates.**
2. Request **deliverables to you**
3. After you’ve curated and offered feedback, **allow presentation** by Team Leader to Leadership Team.
4. Send “final drafts” to “outer loop” for “**open comment periods**”

PROCESS: THE EXECUTION

Utilize Advisory Committees



1. Advisory boards/councils/committees create inclusion opportunities
2. Infrequent meeting
3. No control or responsibility – just advice and feedback
4. Think “external” subject matter expertise

PROCESS: THE EXECUTION

Own the final documents

1. Create “**open comment periods**” to create inclusive optics and give opportunity for input
2. Can utilize **shared documents**, but for open comment periods, suggest **transitioning to controlled document** with separate inputs
3. Be the **collector and the finalizer** – can engage Leadership Team here, or closer circle
4. Send “final drafts” to “outer loop” for “**final look**”
5. Send **final work product** to full group with thanks.

Communication

COMMUNICATION: OPEN, TRANSPARENT AND CAREFUL

Connector

1. Send contact list to full group
2. Send initiating emails to each “Workgroup” (then step out)
3. Set and host periodic “Update Calls” with agenda (be engaging)
4. Understand the need for incentives and to “see inside the tent”



COMMUNICATION: OPEN, TRANSPARENT AND CAREFUL

Contracts

1. Clear assignments
2. Clear acceptances
3. Fidelity



COMMUNICATION: OPEN, TRANSPARENT AND CAREFUL

Ex-ante and Ex-post

1. Pre-meeting preparatory communications
2. Post-meeting summary and actionable communications
3. Updates and Progress (email or meeting)



COMMUNICATION: OPEN, TRANSPARENT AND CAREFUL

The Performer, the Tent and the Circus

1. Understand need for different communications with different audience
2. Keep 1-1 touch points with the “performers” (Leadership Team & Champions)
3. Manage the work with the “tent”
4. Create transparency and “buy-in” with full-circus communications



Accountability

ACCOUNTABILITY: INCENTIVES, FOLLOW UP, AND KEEP SCORE

1. Make responsibilities known to everyone
2. Let the group know that “some has gotten done” but “others have not” (thank those that have been responsible)
3. Celebrate the wins
4. Renegotiate the contracts
5. Show progress and give credit to achieving parties





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