

Strategic Planning for Research Careers at HSIs



Overview

- Introduction to CAHSSA and co-investigators
- Funding in the Arc of Your Career
- Strategies, tools, and processes for planning a productive research career
- My NSF Application Process
 - **Guest Presenter:** Lydia Dixon, Assistant Professor of Health Science, Cal State University Channel Islands
- Virtual Networking

Co-Investigators and Personnel

- **Barbara Endemaño Walker**

- Director of Research Development and Special Assistant to the Executive V Chancellor for Diversity Initiatives, UC Santa Barbara



- **Belinda Robnett**

- Professor Emerita of Sociology, University of California, Santa Barbara



- **Leslie Ponciano**

- Director of Research Opportunities, California State University Chancellor's Office



- **Holly Hapke**

- Director of Research Development, School of Social Sciences, UC Irvine



- **Isha Bhallamudi**

- Doctoral Candidate, Department of Sociology, UC Irvine



- **Billy Wagner**

- Professor of Health Sciences and Sociology, CSU Channel Islands
Executive Director, Social Science Research & Instructional Council of the CSU



CSU Social Science Research & Instructional Council (SSRIC)

- 21 of 23 CSU Campuses have representation
- Annual faculty awards: CalSpeaks Fellowship, ICPSR Stipends, Instructional Materials Awards
- Access to secondary data sources: ICPSR and others
- Annual Student Research Conference
- Workshops
- Coming Soon: possible grant support (\$ +/- or admin)
- *Billy Wagner, Executive Director of SSRIC:*
billy.wagner@csuci.edu

Introduction to CAHSSA



Origin Story

- NSF Build and Broaden Program
 - https://www.nsf.gov/publications/pub_summ.jsp?ods_key=nsf22530
- B&B supports fundamental research at minority-serving institutions (MSIs) and encourages research collaborations with scholars at MSIs.
- NSF has received comparatively few grant submissions from MSIs.
 - Between January 1, 2010 to December 31, 2020, roughly 1,000 proposals were funded by the SBE Directorate to UC and CSU campuses. Of these
 - 6% were funded to CSU institutions
 - 62% of these awards went to campuses that are not MSIs.

Our Critical Approach

- NSF attributes the lack of proposals to MSIs having “varying degrees of familiarity with funding opportunities within NSF and particularly within the Social, Behavioral and Economic (SBE) Sciences Directorate.”
- CAHSSA seeks to understand additional limitations for HSIs in California:
 - Hispanic-serving and teaching-serving missions of institutions and faculty
 - Community-based and qualitative approach to social science research
 - Potential biases in review for proposals from MSIs
 - Focus on how NSF can improve to accommodate Hispanic-serving social science research

CAHSSA Interventions

1. Webinar Series

- Demystify NSF to social scientists in UC and CSUs
- Train faculty in writing competitive SBE proposals

2. Mentored Proposal Writing Groups (fall 2022 and 2023)

3. Collaborative proposal writing retreats (winter-spring 2023 and 2024)

4. Social Science Leadership seminar series

5. Research projects

1. Characterizing Hispanic-serving social science survey
2. Content analysis of NSF proposal review

POLL

- UC or CSU?
- Have you applied for an external grant before?
- List your discipline in the chat

Funding in the Arc of Your Career

Intentional Planning Mapped to Tenure and Promotion

- **Milestones**

- Pre-Tenure Reviews
- Tenure (Associate Professor)
- Full Professor
- Full Professor Step 6
- Other?



What is departmental and divisional culture and expectation for each milestone?

What are you rewarded for? (And not rewarded for?)

Find out! Ask chair, mentors, faculty who have recently achieved each step, members of CAP/RTP

Why Do You Need a Strategic Plan?

- people who develop and implement strategies to pursue career-specific goals achieve greater career success as measured by salary, promotions, and level of responsibility
 - Ng T. W. H, Eby L. T., Sorensen K. L., and Feldman D. C. (2005). “Predictors of objective and subjective career success: A meta-analysis.” *Personnel Psychology*, 58, 367–408.
- they also report greater career satisfaction and rate themselves as more successful than their peers compared to those without career plans
 - Abele A. E. and Wiese B. S. (2008). “The nomological network of self-management strategies and career success.” *Journal of Occupational and Organizational Psychology*, 81, 733-749.

Portfolio Connections and Balance



The Arc of Your Career

- Seed – Pilot Funding or Collaboration
- Early Career Award
- Conference Travel
- Residential Fellowship
- Research Grants and Fellowships
 - Individual
 - Collaboration
- Large Center Grants
- Scholarly Prizes
- Training Grants



***STRATEGIC
TIMING: limited
submissions and
limit on number
of applications***

Forms of funding - Fellowships

- Fellowships
 - Submitted by individual (you)
 - Funded to individual
 - Lump sum (not an itemized budget)
- Example:
 - American Council of Learned Societies (ACLS)
- Plan in advance administration if requesting course buyout, release to grant, or salary supplement

Forms of Funding - Grants

- Grants
 - Submitted by your institution on your behalf
 - Funded to university
 - Itemized budget
 - Indirect Costs (IDC) – overhead applies
 - Institutional grants manager manages and monitors funds
 - Reporting required
 - Unexpended funds returned to funder
- Examples:
 - Federal agencies (NSF, NEH)

Individual v. Collaboration?

- Do you need to collaborate to establish your record before going for your first NSF grant or NIH R01?
- Could your project be innovated by a new contribution?
 - Methodological
 - Theoretical
 - Data, sites, materials
- Do you like working with other people?



What is the context in your discipline or department?

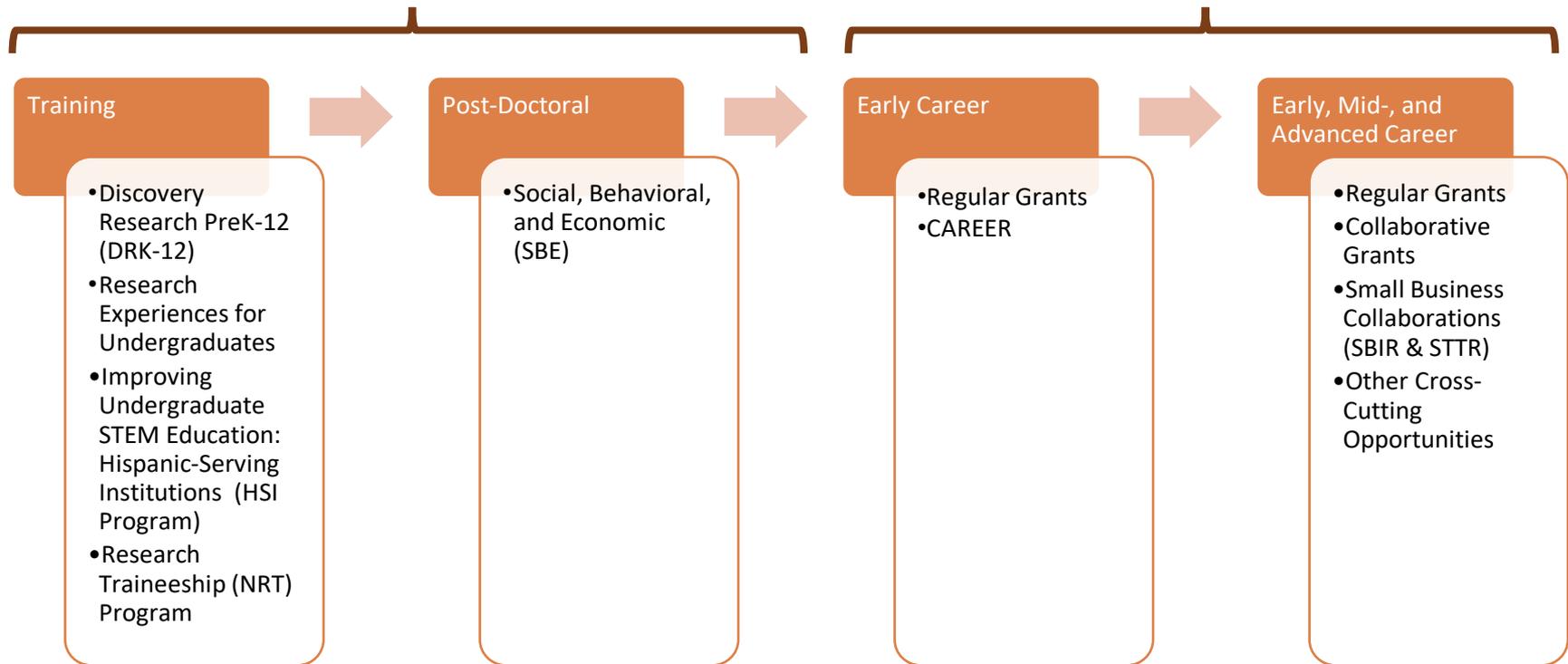
Developing Collaborations

- Identifying the Right People
 - Word of mouth – ask your mentors, colleagues, and Office of Research / Research Development office
 - Literature or funding agency search – who has recently been funded or published in the area you are seeking?
 - NIH Matchmaker: <https://reporter.nih.gov/matchmaker>
 - Some funding search engines have expertise databases (PIVOT)
- Introduce yourself, or ask for an e-introduction from someone
- Time and Accountability?
- Collaboration Agreement – how do all benefit?
 - NIH: <https://www.nhlbi.nih.gov/about/intramural-research/collaborative-research-agreements>
- Collaboration and Team Science Field Guide
 - <https://www.cancer.gov/about-nci/organization/crs/research-initiatives/team-science-field-guide/collaboration-team-science-guide.pdf>

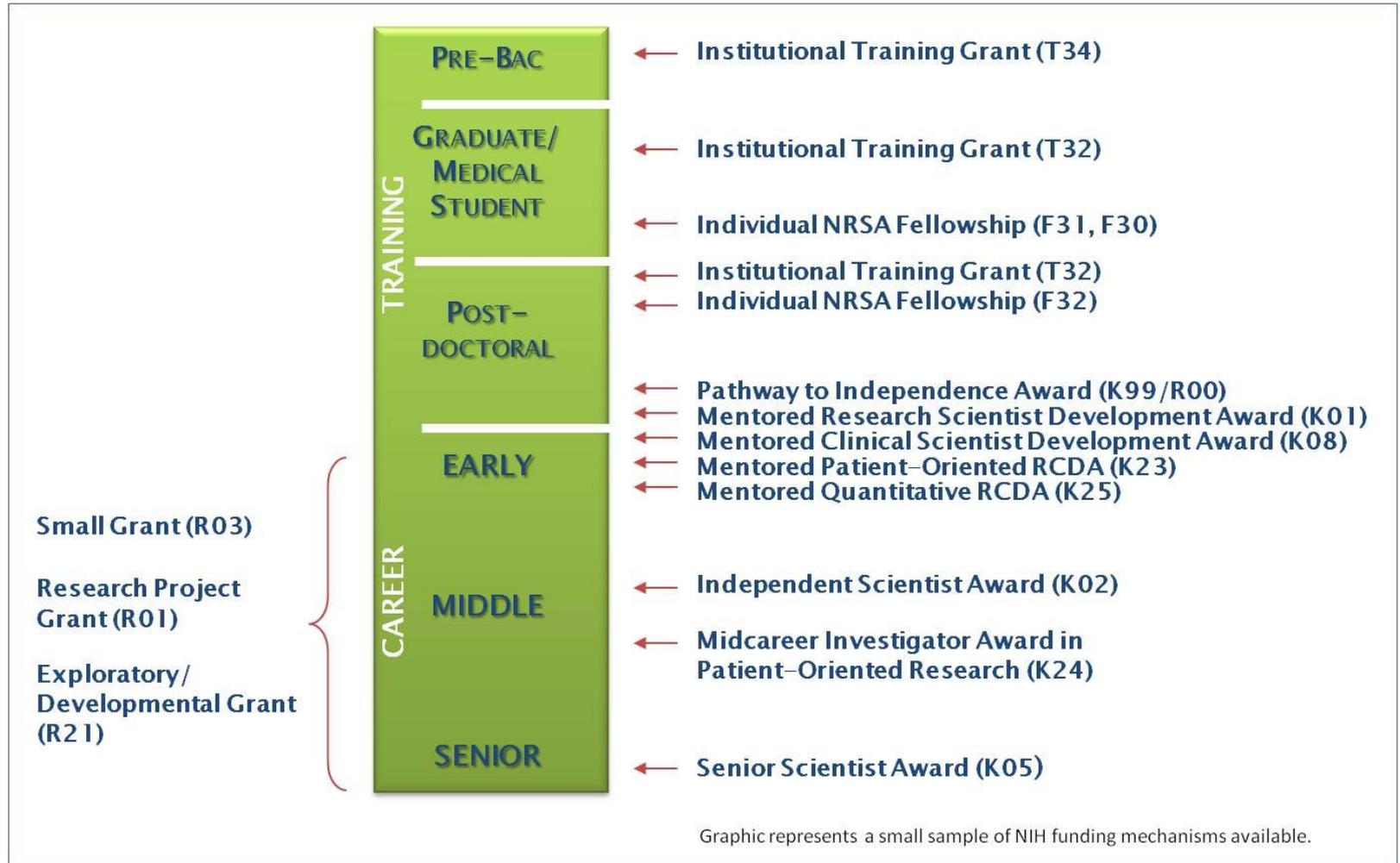
NSF

TRAINING

CAREER



NIH



Extramural Early Career Awards

- American Association of University Women (AAUW) American Fellowships
- American Council of Learned Societies Fellowship Program
- Ford Foundation Postdoctoral Fellowship
- National Geographic Society Level I Grant
- NSF CAREER (SBE and EHR)
- Russell Sage Foundation
 - Proposal Development Summer Institute
 - Pipeline Grants Competition
- Sloan Research Fellowships (Economics)
- Wenner Gren Hunt Postdoctoral Fellowships (Anthropology)
- William T. Grant Scholars

Extramural Mid-Advanced Career Awards

- Fitch Mid-Career Fellowship (historic preservation)
- Getty Scholar Grants
- Guggenheim Fellowship
- NSF Mid-Career Advancement (MCA)

What Can You Fund?

- Personnel – self, students, co-PIs
 - Salary
 - Benefits
- Travel
- Sub-Contracts (collaborators or consultants)
- Participant Support
 - (e.g. conference and training costs that includes external people other than salaried personnel)
- Other Direct Costs
 - Equipment
 - Supplies and Materials
 - Telephone and fax tolls specific to project
 - Software
 - IT Support
 - Human subjects payments
- Indirect Costs



Steps in fund source seeking

- Find out who funds the work you admire or cite
- Do electronic database and internet searches
- Narrow the list, determine feasible targets
- Research each funder thoroughly
- Contact program officer (more details in future webinars)

Funding Search Engines

- Grants.gov
- Philanthropy News Digest
 - <https://philanthropynewsdigest.org>
- Campus Subscription
 - PIVOT
 - SPIN
 - Grants Resource Center (CSU)
- Individual Subscriptions
 - Thompson Grants (\$29/month)
 - <https://www.thompsongrants.com/ce-trial>
 - Grant Select (\$150/3 months)
 - <https://www.grantselect.com/index.html>

Research Target Agencies

- Study Websites
- Understand mission, goals, and mandate of funder
- Understand submission and review process
- Try to find out who reviewers are
 - NSF – confidential
 - NIH published study section
 - NEH – confidential
 - Private funders - it could be the executive committee or advisory board

Assess Previously Funded Research

- Review awards database on agency website
 - Titles
 - Abstracts
 - Award amounts
- Find out average budgets, project duration, success rates
- Find colleagues who have been funded and ask
 - Sample successful proposals
 - Advice

Finding / Funding the “Sweet Spot”



Sequential and Patchwork Funding

- Coordinate multiple funding sources
- Many projects in SS and HSS disciplines are not fully funded by one source

Strategies, tools, and processes for planning a productive research career

Create a Mental Map

- Bullet Journal *
- Calendar
- Publishing Pipeline
- Spreadsheet
- White Board
- Coggle
- Mindmeister



Include:

- *Short and Long Term Goals*
- *Deadlines*
- *Target Grants*
- *Target Journals for Publications*
- *Conferences*
- *Courses*
- *Other?*

Portfolio Connections and Balance



6 Year Plan Template

Milestone: _____



Categories	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Goals
<i>Courses Developed & Taught</i>							
<i>Publications</i>							
<i>Grants</i>							
<i>Conferences & Presentations</i>							
<i>Professional Development</i>							

Project Logic Model (Reverse Engineering)

(this example is for a grant, but you can adapt for other long term goals)

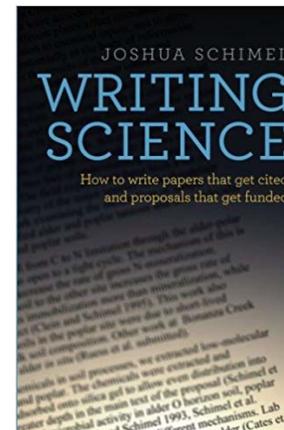
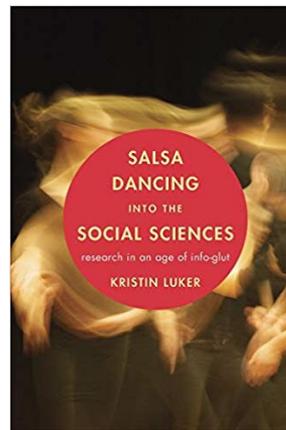
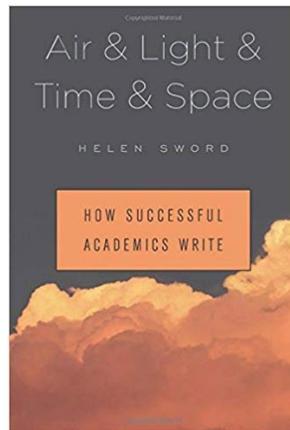
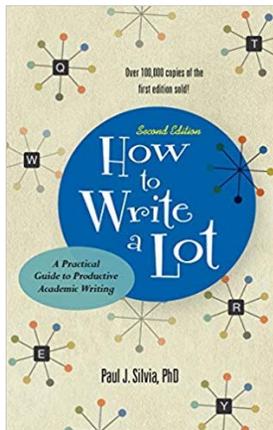
Action Plan / Logic Model Worksheet



Inputs	Activities & Outputs	Short Term Outcomes and Impacts target date: _____	Medium Term Outcomes and Impacts target date: _____	Long Term Outcomes and Impacts target date: _____
faculty position	proposal writing workshops	understanding of funding agency mission	revise proposal	NSF Grant
professional development	sample successful proposals	draft proposal and budget	submit NSF proposal	Course release - time for research and writing
community of colleagues	talk to program director	feedback from peers and experts		
	schedule regular writing			
	writing accountability group			
	peer review group			

Writing Habits

- Daily Writing (Boice, Silvia)
 - **Join or start a Write on Site Group**
- Free Writing (Elbow)
- Identifying and Developing your Writing Habit (Sword)



Project Management Tools

LinkedIn Learning

The screenshot displays the LinkedIn Learning interface. At the top, there is a navigation bar with the LinkedIn Learning logo, a search bar, and icons for Home, My Learning, Me, and EN. Below the navigation bar, a section titled "Explore Project Management topics" features six category buttons: Agile Project Management, Business Analysis, Operations Management, Project Leadership, Project Management Skills, and Project Management... The main content area shows search results for "Project Management" with 5,048 results. On the left, there are filter options for Content by (LinkedIn Learning: 5,048; Your Company: 0), Type (Courses: 199, Videos: 4,918, Learning Paths: 15, Links: 0, Documents: 0, Learning Collections: 0), Level, Software, Custom Tags, and Continuing Education Units. At the bottom left, there are links for Language: English, About, Become an Instructor, Help, and Privacy & Terms. The search results list four courses: 1. "Project Management Foundations" by Bonnie Biafore, released Jun 28, 2019, with 81,486 viewers and a 3h 20m duration. 2. "Cert Prep: Project Management Professional (PMP)®" by Sandra M Mitchell, released Apr 15, 2018, with 310,026 viewers and a 6h 15m duration. 3. "Project Management Foundations: Requirements" by Daniel Stanton, released 1 week ago, with a 27m duration. 4. "Project Management Simplified" by Chris Croft, released Nov 29, 2014, with 143,962 viewers and a 1h 19m duration. A blue tooltip on the right says "Click to see the newest or most popular instead".

LinkedIn Learning

Search for skills, subjects or software

Home My Learning Me EN

Explore Project Management topics

Agile Project Management Business Analysis Operations Management Project Leadership Project Management Skills Project Management...

Filter Results

5,048 Results for "Project Management"

Sort by: Best Match

Click to see the newest or most popular instead

Content by

- LinkedIn Learning (5,048)
- Your Company (0)

Type

- Courses (199)
- Videos (4,918)
- Learning Paths (15)
- Links (0)
- Documents (0)
- Learning Collections (0)

Level

Software

Custom Tags

Continuing Education Units

Language: English

About

Become an Instructor

Help

Privacy & Terms

Project Management Foundations

By: Bonnie Biafore · Released Jun 28, 2019

81,486 viewers

3h 20m

Cert Prep: Project Management Professional (PMP)®

By: Sandra M Mitchell · Released Apr 15, 2018

310,026 viewers

6h 15m

Project Management Foundations: Requirements

By: Daniel Stanton · Released 1 week ago

27m

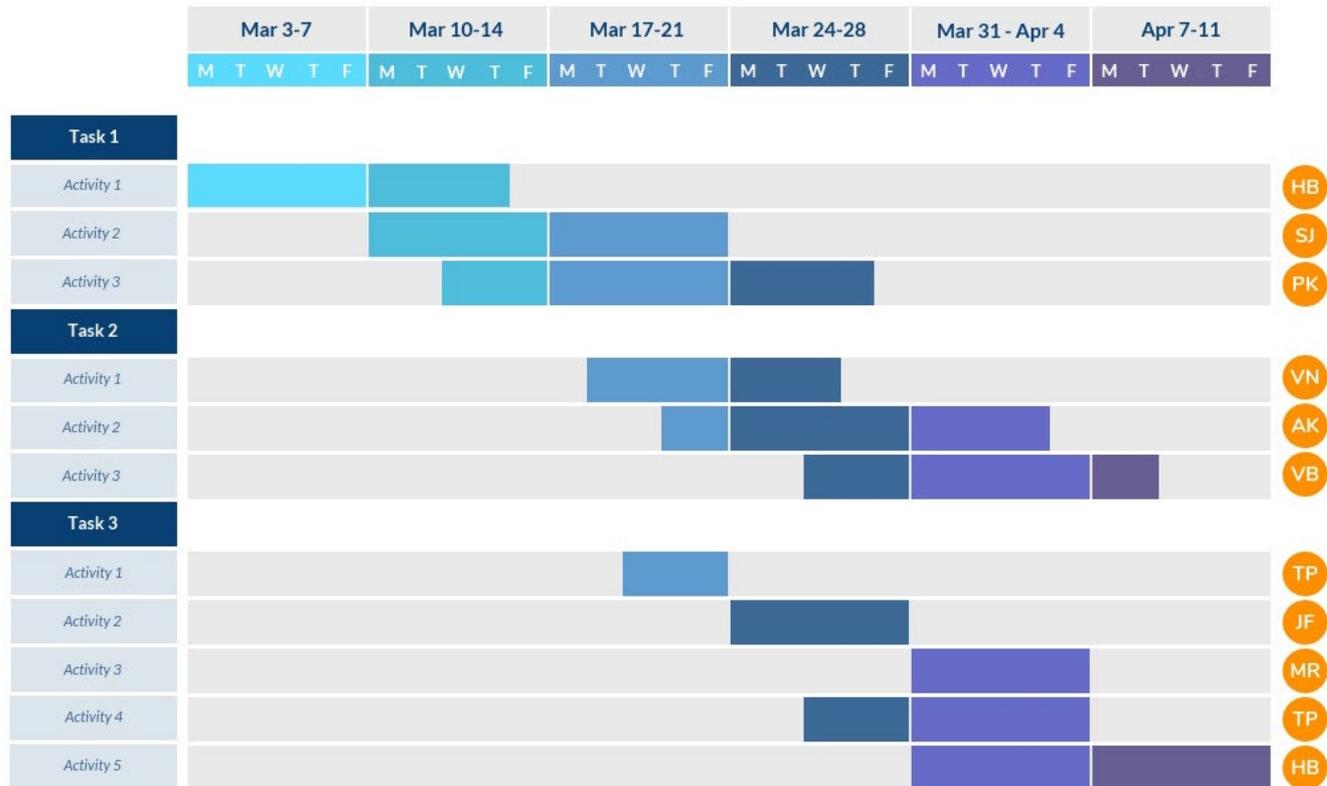
Project Management Simplified

By: Chris Croft · Released Nov 29, 2014

143,962 viewers

1h 19m

GANTT Chart (project/proposal-level planning)



Getting Things Done

- **STEP 1: CAPTURE**

- Write, record, or gather any and everything that has your attention into a collection tool.

- **STEP 2: CLARIFY**

- Is it actionable? If so, decide the next action and project. If not, decide if it is trash, reference, or something to put on hold.

- **STEP 3: ORGANIZE**

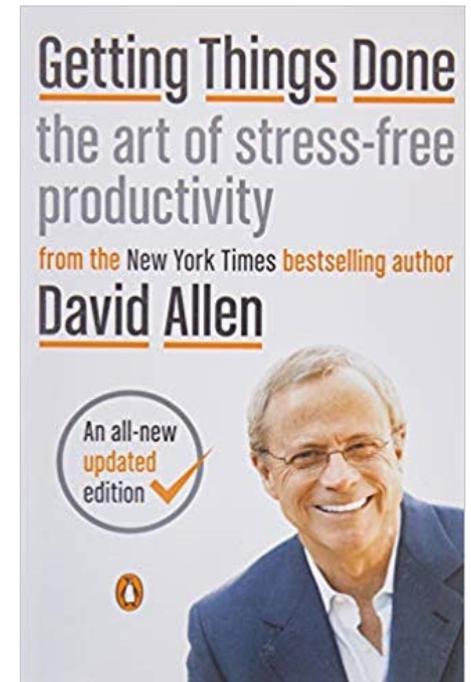
- Park reminders of your categorized content in appropriate places.

- **STEP 4: REFLECT**

- Update and review all pertinent system contents to regain control and focus.

- **STEP 5: ENGAGE**

- Use your trusted system to make action decisions with confidence and clarity.



Annual – Monthly – Weekly Plan Inspiration from Academia

- **What Is Your Vision? Beyond Time Management for Academics**
<http://getalifephd.blogspot.com/2011/03/what-is-your-vision.html>
- **A Step-by-Step Guide to Being an Organized Person in Academia**
<http://getalifephd.blogspot.com/2012/09/a-step-by-step-guide-to-be-organized.html>
- **Five Steps to Making a Semester Plan for Academics**
<http://getalifephd.blogspot.com/2012/01/five-steps-to-making-semester-plan-for.html>
- **Start the Semester off Right: Make a Weekly Template**
<http://getalifephd.blogspot.com/2011/09/seven-steps-to-plan-your-week.html>

Shout out to Tanya Golash-Boza at UC Merced!

National Center for Faculty Diversity and Development (NCFDD)

- Campus and individual subscription
- SKILL #1: Every Semester Needs a Plan (recording)
- SKILL #2: How to Align Your Time with Your Priorities
- SKILL #4: Mastering Academic Time Management
- Bi-annual Writing Challenge
- Faculty Boot Camp
- Individual Membership:
<https://www.facultydiversity.org/join>

AAAS IDP

- AAAS Individual Development Plan

- <https://myidp.sciencecareers.org/>
- 6-Year Plan Template
- Annual Planning Guide

- USC Office of Postdoctoral Affairs – plans for social scientists and humanists

- <https://postdocs.usc.edu/scholars/career-development/idp/>

Assess your proficiency in these areas on a scale of 1-5 where:
1 = Highly deficient
5 = Highly proficient

Scientific Knowledge

1 = Highly deficient | 5 = Highly proficient

<input type="radio"/> 1	<input checked="" type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	[clear]	Broad based knowledge of science
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input checked="" type="radio"/> 4	<input type="radio"/> 5	[clear]	Deep knowledge of my specific research area
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input checked="" type="radio"/> 4	<input type="radio"/> 5	[clear]	Critical evaluation of scientific literature

Research Skills

1 = Highly deficient | 5 = Highly proficient

<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input checked="" type="radio"/> 4	<input type="radio"/> 5	[clear]	Technical skills related to my specific research area
<input type="radio"/> 1	<input type="radio"/> 2	<input checked="" type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	[clear]	Experimental design
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	[clear]	Statistical analysis
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input checked="" type="radio"/> 4	<input type="radio"/> 5	[clear]	Interpretation of data
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input checked="" type="radio"/> 5	[clear]	Creativity/innovative thinking
<input type="radio"/> 1	<input type="radio"/> 2	<input checked="" type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	[clear]	Navigating the peer review process

Communication

1 = Highly deficient | 5 = Highly proficient

<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input checked="" type="radio"/> 5	[clear]	Basic writing and editing
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	[clear]	Writing scientific publications
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	[clear]	Writing grant proposals
<input type="radio"/> 1	<input checked="" type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	[clear]	Writing for nonscientists
<input type="radio"/> 1	<input type="radio"/> 2	<input checked="" type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	[clear]	Speaking clearly and effectively
<input type="radio"/> 1	<input checked="" type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	[clear]	Presenting research to scientists
<input type="radio"/> 1	<input checked="" type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	[clear]	Presenting to nonscientists
<input checked="" type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	[clear]	Teaching in a classroom setting
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input checked="" type="radio"/> 4	<input type="radio"/> 5	[clear]	Training and mentoring individuals
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input checked="" type="radio"/> 4	<input type="radio"/> 5	[clear]	Seeking advice from advisors and mentors
<input type="radio"/> 1	<input checked="" type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	[clear]	Negotiating difficult conversations

Campus Resources

- Research Office
- Research Development – Strategic Initiatives Office
- Faculty Development Office
- Library (search engines, data management plans)

- **ASK YOUR RESEARCH OFFICE!**

Guest Presentation

MY NSF APPLICATION PROCESS

Guest Presenter: Lydia Dixon

Assistant Professor of Health Science

Cal State University Channel Islands





Networking for Collaboration

Networking Breakout Prompts

1. Introduce yourselves

- Brief Description of Your Research Interests
- What is your Favorite TV Show Binge?

2. OTHER Prompts for Discussion

- How can CAHSSA networking support your research goals?
- Are you looking for a collaborator?
- What is your experience with collaboration?

Future Webinars

- Funding Strategies for Social Scientists at HSIs
February 18, 2022, 10:00 – 12:00
- Anatomy of a Winning Proposal
March 17, 2022, 12:00 – 2:00
- Developing Grant Budgets & Data Management Plans
April 22, 2022, 10:00 – 12:00
- Describing Social Science Methods in Proposals
May 19, 2022, 12:00 – 2:00

REGISTER HERE: <https://cahssa.ucsb.edu/programs>

All Links in this Presentation

<https://cahssa.ucsb.edu/strategic-planning-resources>

NSF Build and Broaden Program

- https://www.nsf.gov/publications/pub_summ.jsp?ods_key=nsf22530

Collaboration Resources

- Collaboration Agreement – how do all benefit?
 - NIH: <https://www.nhlbi.nih.gov/about/intramural-research/collaborative-research-agreements>
- Collaboration and Team Science Field Guide
 - <https://www.cancer.gov/about-nci/organization/crs/research-initiatives/team-science-field-guide/collaboration-team-science-guide.pdf>
- NIH Matchmaker
 - <https://reporter.nih.gov/matchmaker>

Funding Search Engines

- Philanthropy News Digest
 - <https://philanthropynewsdigest.org>
- Thompson Grants (\$29/month)
 - <https://www.thompsongrants.com/ce-trial>
- Grant Select (\$150/3 months)
 - <https://www.grantselect.com/index.html>

Strategic Planning Templates (downloads)

- [6 year plan template](#)
- [Project Logic Model](#)

All Links in this Presentation (cont'd)

Tanya Golash-Boza, UC Merced – Get a Life PhD Blog

- What Is Your Vision? Beyond Time Management for Academics
 - <http://getalifephd.blogspot.com/2011/03/what-is-your-vision.html>
- A Step-by-Step Guide to Being an Organized Person in Academia
 - <http://getalifephd.blogspot.com/2012/09/a-step-by-step-guide-to-be-organized.html>
- Five Steps to Making a Semester Plan for Academics
 - <http://getalifephd.blogspot.com/2012/01/five-steps-to-making-semester-plan-for.html>
- Start the Semester off Right: Make a Weekly Template
 - <http://getalifephd.blogspot.com/2013/08/start-semester-off-right-make-weekly.html>

National Center for Faculty Diversity and Development (NCFDD)

- <https://www.facultydiversity.org>
- Individual membership: <https://www.facultydiversity.org/join>

Individual Development Plans (IDPs)

- AAAS Individual Development Plan
 - <https://myidp.sciencecareers.org/>
- USC Office of Postdoctoral Affairs – plans for social scientists and humanists
 - <https://postdocs.usc.edu/scholars/career-development/idp/>

THANK YOU!