

Inclusive Research Leadership

Neil Chue Hong, Tracy Teal

4/2/2022

Table of contents

Preface	4
About this content	4
Introduction	5
Feedback welcome!	5
I Scenarios	6
Scenario format	7
Creating a new scenario	7
Editing the scenario.qmd files	7
Engagement with hybrid workers	8
Overcoming barriers to engagement in a hybrid team	8
Scenario parameters	8
Skill	8
Mini-scenarios	9
Format	9
Directions	9
Time	9
Things to remember	9
Scenario	9
Reflection questions	10
Gaining a new hybrid worker	11
New Start	11
“Prerequisites” (what might come before)	11
“Principles” (what are the learning outcomes?)	11
“Prompts”	12
Miniscenarios	12
Act 1	12
Act 2	12
Skill	12
Format	12
Directions	13

Time	13
Things to remember	13
Scenario	13
Reflection questions	13
Onboarding	13
Practicalities	13
Introducing to team	14
Getting to know people	14
Managing overwhelm	14
Example Scenario	15
Feedback: Scenario 1	15
Skill	15
Format	15
Directions	15
Time	15
Things to remember	15
Scenario parameters	16
Scenario	16
Reflection questions	16
Scenario Template	17
Title of Scenario	17
Skill	17
Format	17
Directions	17
Time	17
Things to remember	17
Scenario	18
Reflection questions	18
Example Scenario	19
Feedback: Scenario 1	19
Skill	19
Format	19
Directions	19
Time	19
Things to remember	19
Scenario	20
Reflection questions	20
References	21

Preface

These are materials that could be used in an inclusive research leadership workshop. These are currently under development in [this repository](#).

This content is written in Quarto. To learn more about Quarto books visit <https://quarto.org/docs/books>.

About this content

Researchers and research software developers have developed experience and expertise in their areas of work. They have spent time learning how to code, analyze data and are experts in their domains. As people become leaders in their field, whether it's a small group or a large team, they also need to develop leadership and management skills, but often haven't had the opportunity to learn them, or are self-taught. This lack of knowledge around team leadership negatively impacts the person in the leadership position as well as those in their team. Therefore there is the opportunity for short-format, practical, hands-on training for people in or transitioning to research leadership roles.

We know a lot now from research around leadership as to what makes effective leadership, meaning leadership that allows a team to do its best work, both for the individuals on the team, and the team itself. That includes elements of creating psychological safety and providing opportunities for mastery, autonomy and purpose, and centering inclusiveness, accessibility and culturally responsive practices. Overall, what we know makes for effective leadership, is not always how we see leadership practiced. Therefore not only are there not learning opportunities, but what people learn by 'watching' are not effective practices.

We are developing a course on Inclusive Research Leadership modeled on the The Carpentries 2-day workshop format, which aims to provide participants with opportunities to learn about leadership, based on what we know works, and that values people - both the leader themselves and the people they lead.

Introduction

This the beginning of a set of content for an inclusive leadership workshop.

Ideas for this curriculum are currently being discussed at an SSI CW22 workshop and we're planning a sprint to develop scenarios that could be used as exercises in a workshop.

Feedback welcome!

This is content that is still coming together and ideas and feedback are welcome! Add issues in [this repo](#) or get in touch with Tracy Teal or Neil Chue Hong.

Part I

Scenarios

For a leadership workshop, the exercises are scenarios, where people can practice going through them, either reading and responding themselves, or practicing with a partner.

We'd like to develop scenarios that give workshop participants the chance to practice the things they have just learned in a module. For example, for the 'Giving and receiving feedback' module, you would want practice scenarios where you could practice giving feedback to someone and practice receiving difficult feedback.

Like any skill, only practice helps you get better! These scenarios in a workshop setting give you the space for that practice.

Scenario format

Each scenario has its own page. This is an example.

For each scenario include:

Skill: List the skill being practiced

Format: Is this an individual, paired or group exercise

Directions: Are there any particular directions?

Time:: How much time should participants spend on this exercise? How much on the scenario and how much on the reflection questions?

Scenario: The story of the scenario

Reflection questions: What questions might you ask yourself or others after the scenario?

Creating a new scenario

To create a new scenario

- Clone repo
- Copy the file `scenario_example.qmd` to `scenario_NEWNAME.qmd`
- Edit `scenario_NEWNAME.qmd` (editing instructions)
- Add the name of the new file to `__quarto.yml`
- Push or put in a pull request to repo
- You will see the file now included at URL

Editing the scenario.qmd files

The files for this book are written in [Quarto](#). `.qmd` files are like R Markdown files. You can edit them in any text editor, or in the RStudio IDE.

Instructions on how to work with Quarto books locally is here: <https://quarto.org/docs/books/>

Engagement with hybrid workers

This is template for creating a scenario. To create a new scenario, copy this file to a new file in this same directory 'scenarios/' then fill in your own content in the different sections.

Overcoming barriers to engagement in a hybrid team

Scenario parameters

These are considerations that the facilitator / implementor needs to understand when posing a scenario.

- How many people are already in the (established) team?
- What is the team composition? (e.g. location, personalities)
- What are the hybrid working patterns of the team members? (E.g. which people mainly work from home or a centralised office? Do people have different individual hybrid working patterns?)
- What are the career levels of team members and associated technical experience?
- Does the organisation have policy or guidance on hybrid working?
- Is the person a permanent or temporary addition to the team?
- How does the team maintain contact with each other (e.g. which technology is used, can people have private conversations remotely)?
- Are there barriers to communication (e.g. language, technology, cultural)?
- Does the organisation provide flexible working arrangements (i.e. family commitments, religious observance, caring responsibilities)?
- Are there accessibility requirements to consider?
- Are there mental health requirements to consider (e.g anxiety about returning to the office, other non-work related problems)?
- What are the workloads of your team members?

Skill

What skill are you practicing? - Difficult conversations / communication - Conflict management - Finding / using / signposting to organisational resources - Decision making / implementing/communicating decisions - Building an inclusive team and culture

Mini-scenarios

Situations when the problem is approached / “scenes” in the story 1. Define what engagement levels you would like in your team. Communicate that to an hybrid team. - are you aware of your duty of care as a leader? - are you aware of organisational policies / contract types etc? 2. How do you assess if people are accepting/respecting your expectations? When did you realise that the engagement was lacking? - A member of the team has repeatedly missed team meetings (related to the problem of how do you measure engagement) - Are tasks equally distributed? 3. How do you initiate a conversation when something is raised? - Who has raised a concern? (individual, team member, you, your management) 4. How might you follow up on the initial conversation?

Format

Is this an individual, paired or group exercise?

Directions

Are there any particular directions for this exercise?

Time

How much time should participants spend on this exercise? How much on the scenario and how much on the reflection questions?

Things to remember

Are there quick tip things to remember from the lesson in this scenario?

Scenario

Write the story of the scenario. It may just be for one person, or you may write ‘parts’ for 2 or more people.

Person 1:

Person 2:

Reflection questions

What questions might you ask yourself or others after the scenario?

- How do you create a culture where people can come to you and share problems?

Gaining a new hybrid worker

This is template for creating a scenario. To create a new scenario, copy this file to a new file in this same directory 'scenarios/' then fill in your own content in the different sections.

New Start

Welcoming a new start into an existing team engaging in hybrid working.

“Prerequisites” (what might come before)

Hiring scenario

“Principles” (what are the learning outcomes?)

Onboarding * Culture and Process * Infrastructure * Team building and belonging * “Taking temperature level” - what personal lived experience / circumstances might cause challenges with integration with a team

Setting out expectations * Visibility / understanding and knowing your team * Hard to learn what might be a challenge (less opportunity for casual/intimate conversations) * Hard to see when they are struggling (less easy to notice body language cues of anxiety/depression etc)

Psychological safety

What things do you do in person, what do you do in online? * Balance between urgency of the “task” and preference for having it in person * Take into account practicalities (costs of transport, quality of internet connection)

Protecting your people

Navigating bureaucracy

“Prompts”

- Travel costs (time and money)
- Personal circumstances (e.g. childcare challenges) and how to mitigate them

Miniscenarios

3-part breakdown: 1. creatively-written scenario (context); 1. explanation/break-down of considerations and relevant principles; 1. creatively-written conclusion (from the perspective of enlightened/ideal leadership in that context)

Act 1

- Explaining team practices (practical onboarding)
- Getting people setup on infrastructure
- First meeting with other team members
- Required courses and training
- Assigning the right peer mentor for the new member
- Navigating bureaucracy

Act 2

- Managing overwhelm
- Checking in with the team member
- Helping form relationships with other team members
- Probation / progress-report meetings
- Hitting a personal challenge
- Assigning the right peer mentor for the new member
- Probation / progress-report meetings

Skill

What skill are you practicing?

Format

Is this an individual, paired or group exercise?

Directions

Are there any particular directions for this exercise?

Time

How much time should participants spend on this exercise? How much on the scenario and how much on the reflection questions?

Things to remember

Are there quick tip things to remember from the lesson in this scenario?

Scenario

Write the story of the scenario. It may just be for one person, or you may write 'parts' for 2 or more people.

Person 1:

Person 2:

Reflection questions

What questions might you ask yourself or others after the scenario?

Onboarding

Practicalities

It is \$NewHire's first day on the job, and they will be working remotely for the first few days. They need to be onboarded in the practical ways the team works and is managed: the practical details of using the digital platform (which they are as-yet unfamiliar with), and also the less-documented aspects of your team's workflows. They are (predictably) nervous about making a good first impression and being seen as a 'quick learner', which comes across as a slight brittleness/stiffness and/or faux-cheer in online meetings. How do you proceed?

Principles: * Psychological safety * Establishing accountability * Supporting growth

Introducing to team

###Belonging

\$NewHire has the basics of how to use the digital platform where your team coordinates about work etc. Your team knows there is a new person joining, but (most) have yet to meet them in person or online. You may have some idea of who in your team is likely to be the most welcoming/inclusive/encouraging of a new person, and/or some intuition as to who they would most likely feel a commonality with, but you do need them to be a part of the broader team (which already has a good dynamic, and close ties). How do you proceed?

Principles: * Team-building / belonging * Psychological safety

Getting to know people

One-one... understand their context

Principles: * Psychological safety

Managing overwhelm

The first few weeks can be tough, navigating new expectations/team/environment/work

Example Scenario

This is an example scenario. To create a new scenario, copy this file to a new file in this same directory 'scenarios/' then fill in your own content in the different sections.

Feedback: Scenario 1

Skill

The skill being practiced is giving feedback.

Format

2 person

Directions

In this scenario one person will be the one giving the feedback and the other will be the one receiving the feedback. Both people should read the scenario.

Time

Spend 3 minutes giving the feedback and responding, 2 minutes discussing.

Things to remember

Remember: You want to provide feedback, so that the student is aware of the issues and can work with you on finding solutions. You don't want to provide solutions for the student.

Scenario parameters

These are considerations that the facilitator / implementor needs to understand when posing a scenario.

- How many people are already in the (established) team?
- What is the team composition? (e.g. location, personalities)
- What are the hybrid working patterns of the team members? (E.g. which people mainly work from home or a centralised office? Do people have different individual hybrid working patterns?)
- What are the career levels of team members and associated technical experience?
- Does the organisation have policy or guidance on hybrid working?
- Is the person a permanent or temporary addition to the team?
- How does the team maintain contact with each other (e.g. which technology is used, can people have private conversations remotely)?
- Are there barriers to communication (e.g. language, technology, cultural)?
- Does the organisation provide flexible working arrangements (i.e. family commitments, religious observance, caring responsibilities)?
- Are there accessibility requirements to consider?
- Are there mental health requirements to consider (e.g anxiety about returning to the office, other non-work related problems)?
- What are the workloads of your team members?

Scenario

Person 1: You are a professor leading a lab of 3 students and 2 postdocs. A third year student in the lab has been working on a project for awhile and not making progress. The student is frustrated with their lack of progress, and you have to report out on the findings from this grant in 6 months in order to continue receiving funding. In your regular meetings with your student you notice that they keep using the same approaches and seem reluctant to try new approaches.

Person 2: You are a third year graduate student. You've been working on a project for awhile and are frustrated you're not making progress. You are embarrassed though that you haven't made more progress and don't want to look bad to your professor or lab mates, but don't know what to do to change things.

Reflection questions

Person 2: How did that feedback feel to you?

Scenario Template

This is an example scenario. To create a new scenario, copy this file to a new file in this same directory 'scenarios/' then fill in your own content in the different sections.

Title of Scenario

Skill

What skill are you practicing?

Format

Is this an individual, paired or group exercise?

Directions

Are there any particular directions for this exercise?

Time

How much time should participants spend on this exercise? How much on the scenario and how much on the reflection questions?

Things to remember

Are there quick tip things to remember from the lesson in this scenario?

Scenario

Write the story of the scenario. It may just be for one person, or you may write 'parts' for 2 or more people.

Person 1:

Person 2:

Reflection questions

What questions might you ask yourself or others after the scenario?

Example Scenario

This is an example scenario. To create a new scenario, copy this file to a new file in this same directory 'scenarios/' then fill in your own content in the different sections.

Feedback: Scenario 1

Skill

The skill being practiced is giving feedback.

Format

2 person

Directions

In this scenario one person will be the one giving the feedback and the other will be the one receiving the feedback. Both people should read the scenario.

Time

Spend 3 minutes giving the feedback and responding, 2 minutes discussing.

Things to remember

Remember: You want to provide feedback, so that the student is aware of the issues and can work with you on finding solutions. You don't want to provide solutions for the student.

Scenario

Person 1: You are a professor leading a lab of 3 students and 2 postdocs. A third year student in the lab has been working on a project for awhile and not making progress. The student is frustrated with their lack of progress, and you have to report out on the findings from this grant in 6 months in order to continue receiving funding. In your regular meetings with your student you notice that they keep using the same approaches and seem reluctant to try new approaches.

Person 2: You are a third year graduate student. You've been working on a project for awhile and are frustrated you're not making progress. You are embarrassed though that you haven't made more progress and don't want to look bad to your professor or lab mates, but don't know what to do to change things.

Reflection questions

Person 2: How did that feedback feel to you?

Person 1: How did giving the feedback feel to you? Anything you would have done differently?

References

References will be added.