Getting Started: How to Form a Multi-Partner Team

Purpose and how to use this guide:

This resource guides U-M faculty through the critical first step toward large-scale funding: forming the team. Building a multi-partner team takes intention and time. Large federal initiatives increasingly fund cross-sector teams of universities, national labs, and industry rather than single-PI projects. Because these teams take months to form, the team formation should begin well before a funding call is released.

How to use this team formation guide:

1. Pick a date for your team convening meeting, at least 4-5 weeks out.
2. Count backward and work through the weekly checklist below. Tick items off as you go.
3. Adapt the templates at the end for your invitations, agenda, and follow-up.
4. Contact OVPR's Office of Research Development early in planning for help with proposal timelines, team coordination, editing, and graphics.

Before you start: define the challenge, gaps and the roles

Your team members need to understand the problem and their place in it. Before reaching out, draft a one-paragraph vision statement that answers these questions.

- The challenge: What significant problem (regional, national-scale, or field-scale) would this team tackle? Name the funder priority or challenge area it maps to (for example, a Genesis Mission National Science and Technology Challenge).
- ***Why a team: What can this group do that no single lab could?***
- Expertise needed: Which disciplines, methods, data, and facilities does

the problem require? Domain science, AI/ML, data, engineering and translation are often all needed.
- Partners needed: Which sectors should be at the table: other U-M units, other universities, national labs, industry, nonprofits, or federal agencies?
- Leadership: Who will lead or co-lead? ***This effort requires a dedicated lead/co-leads to succeed.***
- If applicable, consider addressing the Heilmeier catechism questions to define your research program

Your goal for the first meeting: Agree on a shared problem statement, identify gaps in the team, or decide whether to pursue a specific opportunity.

Role	What they do	Who
Lead PI / convener	Sets the vision, invites, chairs the meeting	
Co-lead(s)	Shares leadership, especially across disciplines or sectors	
Coordinator/ Administrative	Scheduling, RSVPs, materials, note taking, follow-up	
OVPR contact	Process, proposal-management, and partnership support/consultations	

Week-by-week team formation checklist

Start five weeks before your team meeting date. Each week builds on the last, and invitations go out at Week 4 so busy partners can hold the time.

Week 5: Set the foundation

- ☐ Choose the meeting date, time, and format (in person, Zoom, or hybrid). Check for conflicts with major campus events and funder deadlines.
- ☐ Confirm your co-lead(s) and a coordinator.
- ☐ If you plan to convene new collaborators, schedule 1:1 meetings with them ASAP to gauge interest, compatibility and commitment and establish your team “nucleus” early.

- [ ] Draft the one-paragraph problem statement from "Before you start."
- [ ] Identify one or two funding opportunities, or a funder priority area, that give the meeting a concrete hook.
- [ ] Contact OVPR to say you are convening a team and ask what support is available, or tips they can share to help with facilitating this meeting.
- [ ] Book a room or set up the Zoom link. For external partners, confirm they can access it.

Week 4: Build the invitation list and invite

- [ ] In addition to key collaborators, list 10 to 25 invitees across the expertise and sectors you need. Target the list; don't send a blanket invitation.
- [ ] Use MCommunity, department and institute directories, recent publications, and prior funded projects to find U-M faculty outside your usual network. OVPR may be able to help with identification.
- [ ] ***Add external partners: national lab scientists, industry contacts, and colleagues at other institutions. Ask OVPR for help reaching national labs or companies you don't know.***
- [ ] Check for gaps. Are domain scientists, AI/ML experts, early-career faculty, and data or facility owners all represented?
- [ ] Send personalized invitations with an RSVP link (see Templates).

Week 3: Shape the content

- [ ] Draft the agenda (see "The convening meeting").
- [ ] Invite one or two people to give short framing remarks: the funder priority, a partner's perspective, or a lesson from a past team.
- [ ] Make a one-page pre-read: ***problem statement, funding context, and the questions you want the group to answer.***
- [ ] Follow up personally with key invitees who haven't responded.

Week 2: Prepare the pieces

- [ ] Finalize the agenda and pre-read.
- [ ] Prepare a simple shared document or slide deck where attendees list their expertise, data, facilities, and partner connections.
- [ ] For external partners, check any data-sharing or confidentiality concerns. Keep the first meeting to non-proprietary discussion.

Week 1: Confirm and remind

- [ ] Send the pre-read and a reminder with date, time, location or link, and agenda.
- [ ] Confirm speakers and their timing.
- [ ] Check room, AV and Zoom settings. Order refreshments if in person.

- [ ] Send a final logistics note to external partners.

Meeting day

- [ ] Run the agenda and keep time.
- [ ] Capture attendance, expertise, gaps and action items.
- [ ] Close by confirming next steps, owners and dates out loud.

The convening meeting

A 75- to 90-minute meeting is enough to test whether a team has real momentum. Spend most of the time on discussion, not presentations.

Segment	Time	What happens
Welcome and framing	10–15 min	Lead PI states the challenge, why a team, and the goal for today
Funding and partner context	10–15 min	Short remarks on the funder priority or opportunity; optional partner perspective
Round of introductions	10–15 min	Each person: expertise, data or facilities, and one idea for the challenge
Open discussion	25–40 min	Identify the problem, ***map strengths and gaps***, identify missing partners
Next steps	10–15 min	Facilitator summarizes; group confirms owners, and follow-up meeting

Facilitation tips:

- Have someone other than the facilitator take notes. The facilitator should be listening. The suggested facilitator should be the PI interested in forming the team.

- Ask domain scientists to describe the hardest problem in their field before discussing methods. This keeps the conversation anchored in science.
- Name the gaps out loud: missing disciplines, sectors, data, or facilities. Gaps are what the next meeting fixes.
- ***End with commitments and concrete next steps, not a general "let's stay in touch."***

After the meeting

Send follow-up within ***one week***, while interest is high. Most teams lose momentum in the gap after a good first meeting.

Within one week:

- [ ] Send a follow-up email: thanks, a short summary, action items with owners, and the next meeting date.
- [ ] Share the notes and the expertise and partner map.
- [ ] Personally follow up with anyone who missed the meeting but is essential to the team.

Within one month:

- [ ] Hold a second, smaller working meeting with committed members.
- [ ] Reach out to fill the gaps you named: missing disciplines, partners, data, or facilities.
- [ ] Set up a shared folder and a regular meeting rhythm, such as every two to four weeks.
- [ ] Decide on a first concrete step: a white paper, seed proposal, smaller grant, or workshop that builds the team's track record.

Then:

- [ ] Track funding calls that fit the team and set internal deadlines well ahead of them.
- [ ] Talk with OVPR about proposal and project management consultations for a large submission.
- [ ] Decide whether the team needs a formal structure, such as a steering group or a partner agreement.

Templates

Copy and adapt/revise these. Replace the bracketed text.

Invitation email (Week 4)

Subject: Invitation: Building a team on [challenge] — [date]

Dear [Name],

I'm convening a group of researchers and partners to explore a collaborative effort on [challenge in one sentence]. Your expertise in [their area] would be valuable to this conversation.

We'll meet on [date, time] at [location / Zoom]. In 90 minutes, we'll [goal, e.g., refine a shared problem statement and identify the expertise and partners we need]. This connects to [funding opportunity or priority area].

Please RSVP by [date]: [link]. If you can't attend but are interested, let me know and I'll keep you in the loop.

Best,
[Name]

Reminder email (Week 1)

Subject: Reminder: [Meeting title] on [date]

Dear [Name],

A reminder that we'll meet on [date, time] at [location / Zoom link]. The agenda and a one-page pre-read are attached. Please come ready to share your expertise and one idea for how we might tackle [challenge].

Looking forward to it,
[Name]

Follow-up email (within one week)

Subject: Thank you and next steps: [Meeting title]

Dear all,

Thank you for joining on [date]. We discussed [one to two sentences on themes and direction].

Next steps:
- [Action] — [owner], by [date]
- [Action] — [owner], by [date]

Notes and the expertise map are here: [link]. Our next meeting is [date, time]. Please reach out if you know someone who should join us.

Best,
[Name]

Kickoff Meeting Agenda

[Team or challenge name]: Kick-off Meeting

[Date] | [Time] | [Location / Zoom link]

Convener: [Lead PI] Facilitator: [Name] Note taker: [Name]

Goal for today: [e.g., agree on a shared problem statement and identify the expertise and partners we need]

[Time] Welcome and framing (10–15 min)
- Lead PI: the challenge, why it needs a team, and today's goal

[Time] Funding and partner context (10–15 min)
- The funder priority or opportunity we are aiming for
- Optional: a partner's perspective

[Time] Round of introductions (10–15 min)
- Each person: expertise, data or facilities, and one idea for the challenge

[Time] Open discussion (25–40 min)
- Refine the problem
- Map our strengths and gaps
- Identify missing disciplines and partners

[Time] Next steps (10–15 min)
- Facilitator summarizes
- Confirm action items, owners, and dates
- Set the follow-up meeting

Pre-read: [link]

U-M resources and support

Reach out early. Support is most useful before a funding call is released, not in the final weeks.

Need	**Where to start**
Team/Idea development, proposal and project management consults, agency priorities and strategic intelligence	OVPR Office of Research Development
Finding and engaging the *right* National lab partner; Genesis Mission updates	OVPR Office of National Labs: Genesis Mission
Finding and engaging the *right* industry partners	U-M Innovation Partnerships, specifically the Corporate and Foundation Research Alliances Fast Forward Medical Innovation, specifically Business Development (this unit serves the Medical School) Corporate & Foundation Relations
Finding U-M collaborators, Michigan Experts	MCommunity; department, institute, and center directories Michigan Research Experts

Proposal submission and agreements	Your unit research administrator; Office of Research and Sponsored Projects (ORSP)
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