Institute for Clinical and Translational Research
UNIVERSITY OF WISCONSIN–MADISON

**Collaboration Planning Worksheet Template**

## UW-ICTR Collaboration Planning

Collaboration Planning helps teams develop strong collaborative relationships from the beginning of a project by proactively addressing potential areas of conflict before they arise. In a facilitated discussion, our Team Science experts will guide your team through key dimensions of its project, including: the team's vision, roles, outputs, culture, decision-making processes, and plans for project, data, and information management.

Collaboration Planning is most effective when all team members participate in the process. We recommend that teams participate in a facilitator-led session because we believe that a trained facilitator

- Makes the session more productive by keeping the discussion moving,
- Ensures the team thinks deeply about team processes by asking probing questions,
- Encourages all team members to speak, and
- Enforces session ground rules.

To schedule a Collaboration Planning Session, contact teamscience@ictr.wisc.edu. You can also contact Whitney Sweeney (wasweeney@wisc.edu) directly.

| Question | Team Notes |
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| **Section 1: Shared Team Vision for Success** | |
| Based on how each team member defines success, what does a shared vision of success for this project look like? | |
| What is the longer-term vision for this project, for this team, and potentially beyond? | |

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| **Section 2: People, Roles, & Responsibilities** | |
| What is each team member's role in contributing to the success of the team (i.e., what will each member contribute)? | |
| Are there other people with additional skills, knowledge, perspectives, or expertise that we should consider inviting to support this work? | |
| Do you have needs that must be met to ensure your full participation in this work? Examples might include translational services, childcare, or transportation support. | |
| **Section 3: Publications, Presentations, and Recognition** | |
| What kind of products do you anticipate from this project, such as publications, presentations, or patents? | |
| If data are collected from patients and/or community members, how and when will the results be communicated with those groups, and will this happen before the data is publicly shared? | |
| If presentations or manuscripts come out of this work, which team members would be interested in contributing to those efforts? | |
| How will you make decisions about how recognition is assigned in terms of author order? | |
| What type of recognition do the community organizations involved in the project need? | |

| **Section 4: Team Culture** | |
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| What are team members' core values for partnership? | |
| Which are shared core values of the team? | |
| How do you plan to communicate the teams' core values? | |
| What are expectations for partnership including how team members will work together? | |
| How do you plan to hold team members accountable to expectations? | |
| **Section 5: Team Communication and Decision-Making** | |
| What is your process for making decisions about:<br>• Scientific direction?<br>• Resource allocation?<br>• Personnel?<br>• Selection of data sources?<br>• Use of AI and other data science tools and techniques?<br>• Other? | |
| What do you do when disagreements arise? | |
| How can your team assess if it is functioning well? | |
| What red flags, if any, indicate problems? | |

| **Section 6: Project Management and Resources** | |
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| How do you anticipate managing the project? | |
| Who will organize meetings and record the discussion, decisions, and next steps? | |
| How often will your team meet and how will the meetings take place (virtual, in person, hybrid)? | |
| To what extent do the meeting formats (virtual, in person) meet everybody's needs? How can you accommodate differences? | |
| Will the UW resources and software platforms be accessible to the entire team? | |
| At a high level, how will data be managed? | |
| In what ways, if at all, will the community partners at this table be involved in interpreting data? | |

| **Section 7: Producing High Quality Research** | |
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| How are team documents, processes, and project data stored so they are accessible for future use? | |
| How will this information be communicated to the entire team? | |
| How can the team work together to ensure that the research is of the highest quality and can be replicated? | |

**References**

Hall, K.L., Vogel, A.L., Crowston, K. (2019). Comprehensive Collaboration Plans: Practical Considerations Spanning Across Individual Collaborators to Institutional Supports. In: Hall, K., Vogel, A., Croyle, R. (eds) Strategies for Team Science Success. Springer, Cham. https://doi.org/10.1007/978-3-030-20992-6_45

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