

## 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](mailto:teamscience@ictr.wisc.edu). You can also contact Whitney Sweeney ([wasweeney@wisc.edu](mailto:wasweeney@wisc.edu)) directly.

Question	Team Notes
<b>Section 1: Shared Team Vision for Success</b>	
What are the primary goals for this project?	
Beyond the primary goals, what else should be included in a shared vision of success for this team's collaboration on this project?	
What is the longer-term vision for this project, for this team, and potentially beyond?	



<b>Section 2: People, Roles, &amp; Responsibilities</b>	
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?	
<b>Section 3: Publications, Presentations, and Recognition</b>	
What kind of products do you anticipate from this project, such as publications, presentations, or patents?	
What type of recognition do the community partners/organizations involved in the project need?	
How will you make decisions about how recognition is assigned in terms of author order?	
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?	



#### Section 4: Team Culture

Which are your team's shared core values?

- Years from now when you look back on this project, how do you want your collaboration to be remembered?

How do you plan to communicate the expectations for partnership?

#### Section 5: Team Communication and Decision-Making

What is your process for making decisions about:

- Scientific direction?
- Resource allocation?
- Personnel?
- Selection of data sources?
- Use of AI and other data science tools and techniques?
- Other?

How do you know if your team is functioning well?

What red flags, if any, indicate problems?

Consider adding a short "team function" question to team meetings. Which (if any) of the following examples would be useful for your team?

Examples:

- Did our team work as effectively as possible this past [month, week]?
- What did our team learn this week and how does that impact what we do next?
- What is one thing that happened this month that exemplified our team values?
- How did we do this month in making progress toward our goals?
- Where are we struggling to meet our team expectations?
- Is there a way that our team can better support you in your work?
- Other - Please add your own examples here:



<b>Section 6: Project Management and Resources</b>	
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?	
Teams communicate in different ways. What asynchronous communication tools and practices do you think will work best for this project, and how can you use them to keep information clear and accessible?	
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 community partners be involved in interpreting data?	



## Section 7: Producing High-Quality Research

Reproducibility can look different across fields, with each discipline bringing its own strengths. What positive disciplinary approaches have you seen that could be adapted or combined to improve reproducibility in interdisciplinary projects?

What is one small change you and your team could make that would meaningfully improve rigor and reproducibility of this project?

## 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.  
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