

Collaboration Planning Worksheet

Project Title:
Team Members:
Session Date:
Facilitator(s):

Question	Team Notes
Section 1: Team Vision	
What is the overarching research question/problem you'd like to answer/solve?	
How can you and your team members create a shared vision of what success looks like for this project? How do you ensure everyone's goals are in alignment with that shared vision?	
What is the longer-term team vision?	
What does success look like in tangible terms? (e.g., collect preliminary data, piloting test an intervention)	
Section 2: People, Roles, & Responsibilities	
Who is on this team and what skill sets do they contribute to achieving your team's shared goals for this project?	

<p>Are there skill sets that are missing? Have you engaged relevant community partners?</p>	
<p>Do any of your team members have unique needs? (e.g., early career faculty preparing for tenure or promotion, staff needing project management training)?</p>	
<p>Section 3: Team Outputs</p>	
<p>What outputs do you anticipate arising? Examples:</p> <ul style="list-style-type: none"> • Publications • Intellectual property/patents • Data sets • Conference presentations • Public outreach/communication • Preliminary data for future grants 	
<p>Which of these outputs are the highest priority? Why?</p>	
<p>What will your authorship or attribution policies be?</p>	
<p>Section 4: Team Culture</p>	
<p>How would you describe your team's culture to a new member? What are some of your team norms and expectations?</p>	

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<p>How can you make that team culture explicit and communicate and enforce those team norms and expectations for all members (existing and new)?</p>	
<p>Section 5: Team Processes & Team Functioning</p>	
<p>What is your process for making decisions about:</p> <ul style="list-style-type: none"> • Scientific direction? • Resource allocation? • Personnel? • Selection of data sources? • Use of AI and other data science tools • Techniques? • Other? 	
<p>How can your team assess if it is functioning well? What is your process for resolving disputes? What red flags indicate problems?</p>	
<p>Can you add a short “team function” question to each leadership and/or team meeting? Examples:</p> <ul style="list-style-type: none"> • 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? 	

<ul style="list-style-type: none"> • Where are we struggling to meet our team expectations? • Is there a way that our team can better support you in your work? 	
<p>How is team information documented and stored so it is accessible to all for future use? How is this information communicated to the team?</p>	
Section 6: Project Management & Infrastructure	
<p>How do you anticipate managing the project?</p> <ul style="list-style-type: none"> • Is there a designated project manager? • How will tasks be identified, assigned, tracked, and judged complete? • Who will organize meetings and record the discussion and decisions? • How often will your team meet and by what modality? 	
<p>Are there sub-teams that will meet? If so, how will the outcomes of those meetings be communicated to the larger group?</p>	
<p>Project Infrastructure and Shared Tools:</p> <ul style="list-style-type: none"> • What communication technologies (WebEx, email) will you use to work together? • What coordination technologies (shared calendar, Box, shared drive, project management tools) will you use to work together? 	

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<ul style="list-style-type: none"> • Are there outside collaborators who will need access to UNC-Chapel Hill systems? If so, will the UNC-Chapel Hill resources you're using be accessible to the entire team? 	
<p>Data Management:</p> <ul style="list-style-type: none"> • At a high level, how will data be managed? • What will your data sharing policy be? • Do you need any data use agreements with non-UNC Chapel Hill partners? 	
Section 7: Implementation & Maintenance of the Collaboration Plan	
<p>How can your team work together to create the Collaboration Plan? How can you see your team using the Collaboration Plan?</p>	