

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?	

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

How can you make that team culture explicit and communicate and enforce those team norms and expectations for all members (existing and new)?	
Section 5: Team Processes & Team Functioning	
<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? 	
How can your team assess if it is functioning well? What is your process for resolving disputes? What red flags indicate problems?	
<p>Can you add a short “team function” question to each leadership and/or team meeting?</p> <p>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? 	
How is team information documented and stored so it is accessible to all for future use? How is this information communicated to the team?	
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? 	
Are there sub-teams that will meet? If so, how will the outcomes of those meetings be communicated to the larger group?	
<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? 	

<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>	