



How to Strategically Plan Your Collaborations

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Institute for Clinical and
Translational Research
UNIVERSITY OF WISCONSIN-MADISON

ICTR Team Science

The Team Science Program provides trainings, interventions, and resources to support and enhance the performance of high-impact research teams.



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ICTR Team Science provides

- **Training and education**
 - Best practices in team science
 - Leadership and Skills Enhancement for Research (LASER)
- **Team consultations**
 - Collaboration planning
 - Team debriefs
- **Research catalyst sessions**
- **Scientific insights**
 - Inclusive leadership and team culture
 - Effective project management

"[Collaboration Planning] helped us have a strong and positive start in working through all aspects of our project with mutual respect and value for all contributions of everyone irrespective of their role."

High-Performing Teams

Team Management

- Shared Vision, Clear Roles and Responsibilities, Effective Project Management

Communication

- Shared Knowledge, Transactive Memory

Collaborative Problem Solving

- Learning/Adaptation, Collective Intelligence, Transdisciplinarity

Affect

- Inclusion, Trust, Cohesion, Psychological Safety

Leadership

- Sense-making, Conflict Resolution, Goal-Setting, Networking

Collaboration Planning

- Approach developed at NCI and NSF that synthesized decades of research in various fields:
 - organizational psychology, management theory, teams research, sociology, and others
- Teams benefit when they discuss known, potential challenges to collaborative research and develop strategic plans to overcome them



Shared Team Vision for Success

How can you and your team members create a shared vision of success?



People, Roles, & Responsibilities

Who is on the team and how will they contribute?



Publications, Presentations, & Recognition

How will you develop authorship and attribution policies?



Team Culture

How will you develop shared norms and expectations?



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Collaboration Planning



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Producing High-Quality Research

How will you document and validate your work?



Project Management & Resources

How will you manage tasks and share information?



Team Communication & Decision Making

How will you make decisions and assess teamwork?

(Rolland et al. 2021)

Collaboration Planning Sessions

- **Time**
 - 90 minutes
- **Expected Audience**
 - Whole team participates
- **Staff**
 - Facilitator (required)
 - Note taker (encouraged)
- **Tools/Supplies**
 - Collaboration Planning worksheet template
 - Zoom or other virtual platform
 - Session Evaluations



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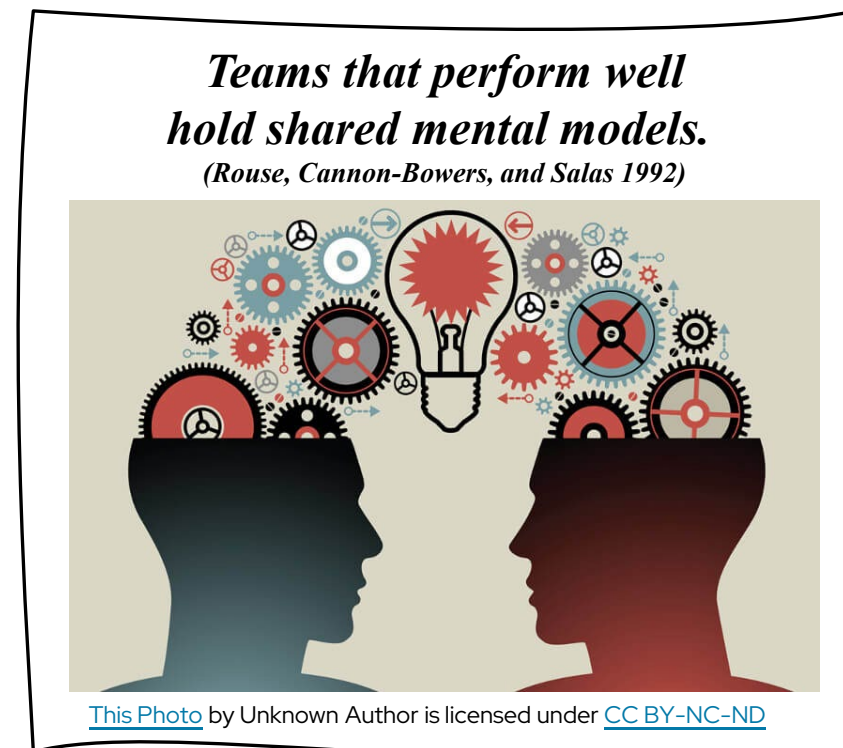
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Creating Shared Mental Models

Definition: SMMs refer to a shared understanding among team members relating to important aspects of a team environment

Establishing SMMs help to

- Reduce uncertainty
- Lower misunderstandings
- Prevent conflict
- Improve coordination and adaptation
- Increase effective team functioning



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Benefits of a Clear Shared Vision

- Clarity in communication to team members.
- Clarity in roles and responsibilities.
- Motivation for the work.
- Enhances team cohesion
- Target for assessment and evaluation.
- Enhances team effectiveness.



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People, Roles, and Responsibilities

- Role clarity enhances team members' levels of job satisfaction, performance, and innovation
- Transactive Memory Systems
 - Who does what
 - Who knows what
 - How to get things done



People, Roles, and Responsibilities

Who is on the team and how will they contribute?

Who else do you need?

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Authorship Policies

- Authorship of scientific papers is one of the most contentious issues in research ethics
 - Honorary authorship – named author who has not made a significant contribution
 - Ghost authorship – failure to name someone who made a significant contribution
 - Big-team Science and many multiple authors
 - Handling disputes and dissenting opinions

Community Partners

- What type of recognition do community organizations involved in the project need?



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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?

Assessing Team Functioning

- Don't forget to assess teamwork!
- How do you check in with your teams?



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Challenges for Research Coordination

- **Visibility:** Keeping team members and sub-groups apprised of each others' progress
- **Learning:** Supporting learning across members and sub-groups
- **Accountability:** Holding all members and sub-groups accountable for their goals and deliverables
- **Culture:** Creating a cohesive and psychologically safe community in which members and sub-groups can innovate

Purposes of Meetings



- Communication
 - Email?
 - Inform Stakeholders
 - Debate
- Problem-Solving
 - Trouble Shooting
 - Big Decision
- Project Management
 - Setting Deadlines
 - Providing Feedback
- Fostering Culture
 - Observing interpersonal interactions
 - Modeling interpersonal skills

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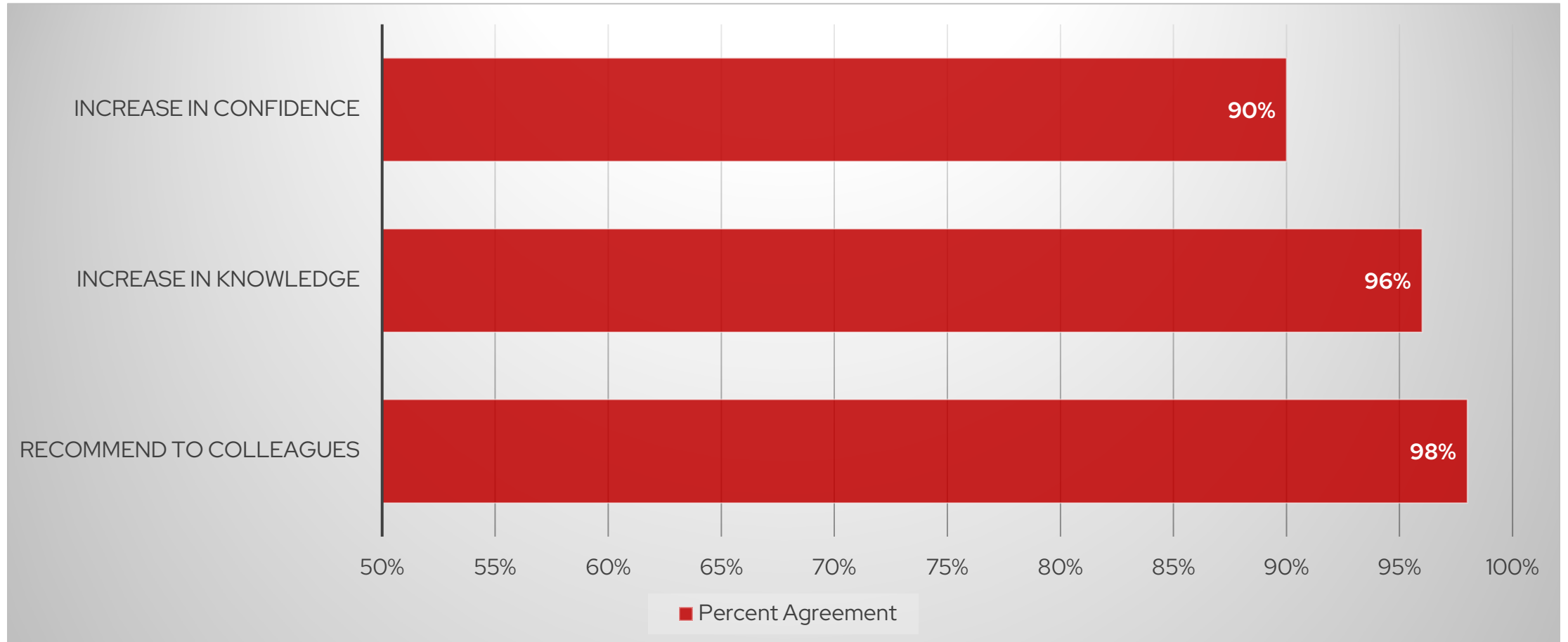
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What processes does your team have in place to validate data, analyses, and conclusions?

Adjusting for Stage of Project

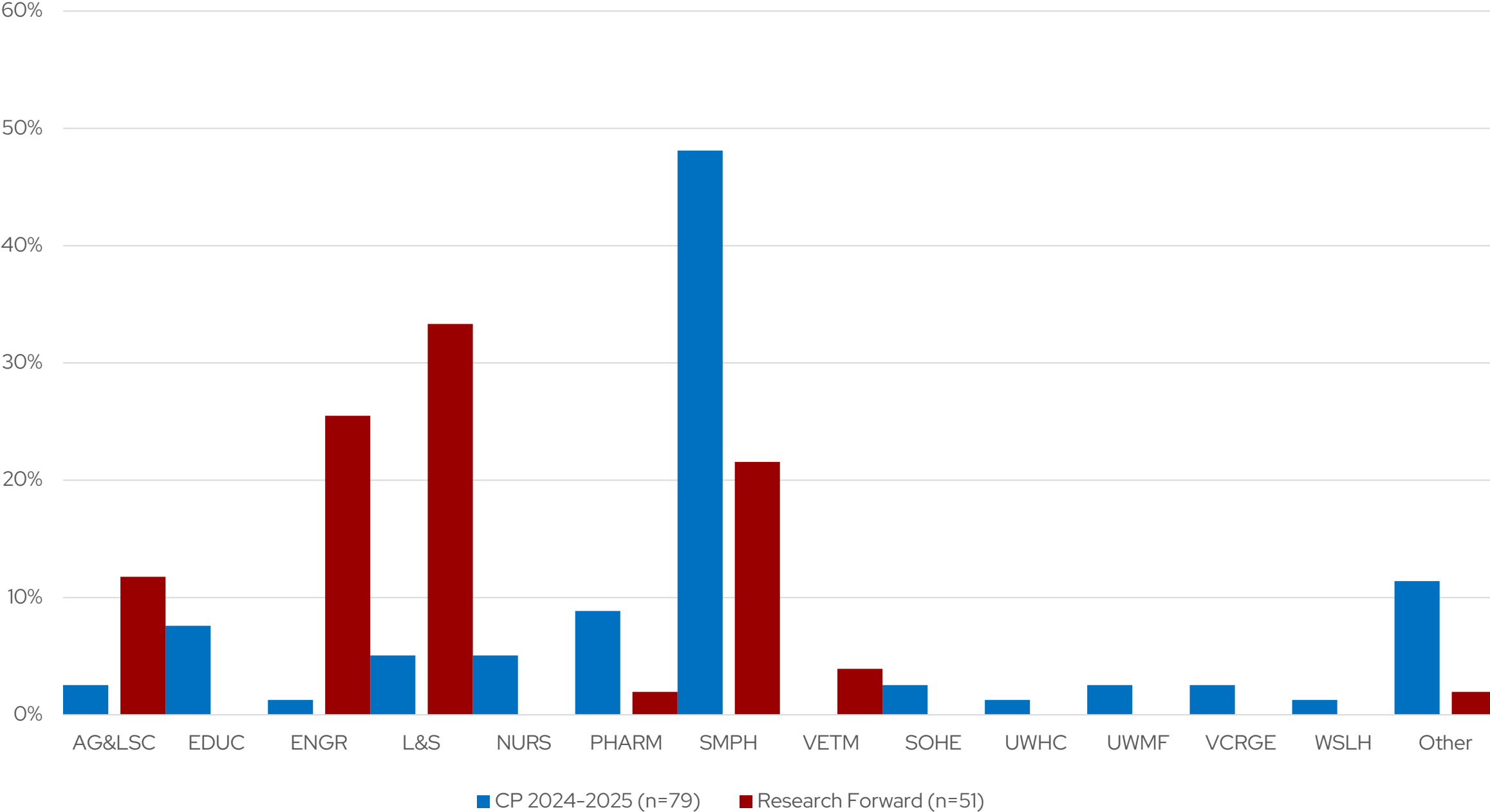
Project Development/Proposal Stage	Project Launch/Post-Award Stage
Shared Team Vision for Success	Shared Team Vision for Success
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Publications, Presentations, & Recognition	Publications, Presentations, & Recognition
Team Culture	Team Culture
Team Communication & Decision Making	Team Communication & Decision Making
Project Management & Resources	Project Management & Resources
Producing High Quality Research	Producing High Quality Research

UW-ICTR Collaboration Planning Intervention Evaluation Results (2024- 2025)



N=51

Participating Schools and Colleges



Actions Inspired by CP Session

- Improve clarity, frequency and openness in team interactions
 - “Check in with team members more often to understand their expectations.”
- Set up consistent and purposeful meetings
 - “Regular meetings; open discussions.”
- Formalize group norms and support new team members
 - “Use Collaboration Plan to assemble a ‘here is our group culture guideline.’”
- Clarify expectations around authorship
 - “Consider co-authorship structure for future papers.”

Additional Benefits of CP

Trust Development	Building trust among team members 83%
Mutual Learning	Encouraging contributions from all team members 100%
Partnership Capacity	Preparing all team members to collaborate 100%
Shared Power	Supporting shared ownership of ideas/decisions. 96%

(Belone et al. 2016)

Questions?



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