<u>Collaboration Conversation Checklist</u>
Rachel McLaren, NCFDD Webinar on Drama-Free Collaborations

Here are some issues to consider discussing with potential collaborators. Please feel free to edit this checklist for your own specific situation. If you don't already know the collaborator on a personal level, consider spending a few minutes getting to know them first to set the groundwork for rest of the conversation.

<u>Managing Workflow and Expectations</u>
- ✓ What is your timeline for this project?
  - o Do you engage in strategic planning? How can we align our planning for this project?

- ✓ What is your typical writing schedule? Are you a daily writer? Discuss how this might affect your timeline and workflow.

- ✓ How high of a priority is this project for you to complete? (i.e., What are each of your career goals and how does this project contribute to them? Will you be on the job market next year? Will you be going up for promotion and tenure and need this for your file?)

- ✓ What is the targeted outlet for the project?

- ✓ Authorship: How will we handle authorship? Will there be multiple papers coming out of the collaboration? If so, will you alternate who is the lead author? (see additional resources below).

- ✓ Data considerations: Who will have access to the data and how? What if someone needs to access it later?

- ✓ What is a reasonable amount of time to expect a person to respond to emails? What if a co-author stops responding? What actions should we take if someone is unresponsive to emails and phone calls?

- ✓ What method do you prefer to use for sharing drafts of a document? Discuss pros and cons before deciding.

- ✓ How will we manage the workflow of items that need to be completed related to the project? Will we use technology, such as Trello or other apps, to split up the work?

- ✓ What will be the process for getting collaborators approval before moving forward with a draft? What happens if someone is not satisfied yet?

- ✓ Intellectual questions – consider asking about preferred theories, methodologies, or other approaches that would be helpful to know.

- ✓ Where is this project currently? Is it in the idea phase, data collection phase, writing up phase?

✓ Are you asking others to be involved? Who are they? What can you tell me about their role in the project?

Setting up future dates for checking in
Having a designated time set aside to assess how things are going alleviates the difficulty of deciding whether to bring up an issue and gives collaborators an outlet to talk about how things are going.
   ✓ Can we set up a check-in meeting once a month (or another agreed upon period of time) to assess how the collaboration is going?
   ✓ Questions to ask during the check-ins.
      o What is working well with the collaboration?
      o What isn't working well with the collaboration?
      o Have any of your priorities or timelines changed since we last talked?
         ▪ Possible avenue to talk about shifting course if needed, such as changing authorship or bowing out of a project.
      o What adjustments can we make at this time?

Other considerations
Write down other things that might be specific to your situation that you want to discuss with potential collaborators. These could come from situations that arose in your past and you want to make sure to address ahead of time.

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Additional Resources for Determining Authorship:
   o Consult your disciplinary guides about the ethics of authorship and who should be included as authors. Example: APA's tips for determining authorship credit.
   o Decide whether you want to sign a contract related to authorship.
   o You could consult APA's authorship determination scorecard.
   o There are lot of ethical considerations that go into authorship and credit.
   o Guidance for faculty-student collaborations
   o Ethical considerations for authorship and publication practices