**Collaboration Plan Assignment**

[team assignment – due: Sept. 14 end of day]

Teamwork can be challenging. It’s particularly difficult when there is no formal leader with administrative authority as is the case in SI 501 as well as in many real-world consulting situations, where you may be asked to work with people from across divisions and organizations. Individual work preferences differ based on personality, culture, academic discipline, and so on, but your goal is to come to an agreement about how work should happen within the team.

In this assignment, you will work with your team to establish some common expectations. In some cases, it may be best to assign specific roles and responsibilities to team members, being careful to balance the load across members.

#### Assignment

* Work through the prompts below as a team.
* Update this document throughout the term as tasks and needs change.

#### Submission

* Remove this front page and save the completed document as a Word document or PDF. (Do *not* submit a link to a Google Doc.)
* Submit the file by the end of the day, Sept. 15, on Canvas, as a team.
* If you update your plan later, you do *not*need to resubmit new versions.

#### Grading

This assignment will be graded pass/fail, and your team will receive full credit for completing it with reasonable responses.

If the plan is insufficient or has significant problems, we will ask you to resubmit. In some cases, we may request a meeting with your team.

### Collaboration Plan

#### Part I: Membership

Team Name:

Client or Project:

Group Email address (create at <http://mcommunity.umich.edu)>:

Primary Zoom link[[1]](#footnote-1):

Back-up Zoom link:

Member Contact Information:

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| --- | --- | --- | --- |
| **Member Name** | **UMich email** | **Phone Number** | **Other contact information** |
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#### Part II: Team Roles

Have a conversation with your teammates about one another’s skills and personalities, keeping in mind what you learned about each other from the 501 Hunt as well as the readings. Think through the kinds of roles you might need as well as whether they should be semester-long roles or roles that rotate, and then assign them to one another.

Use the roles listed below or create your own. You do not have to fill every role listed. Note that certain tasks (such as interviewer, note-taker during interviews) will be tasks that every team member is expected to fulfill at some point. In addition, everyone should expect to do work that is not specifically mentioned in the role(s) they are assigned; there may be work that isn’t covered by all the roles.

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| --- | --- | --- | --- |
| **Role (Example Only)** | **Responsibilities (Example Only)** | **Primary** | **Secondary** |
| Client Contact | Manages communications with the client |  |  |
| Program Manager | Responsible for overall coordination: keeping track of tasks and deadlines; communicating with team members; organizing meetings; etc. |  |  |
| Editor | Oversees writing of documents; thinks about document organization; writes parts that no one else writes; proofreads. (Should not do *all* of the writing, however.) |  |  |
| Graphic Designer / Photographer | Takes the lead in the visual look of diagrams and documents. Takes photos of key activities for documentation. |  |  |
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#### Part III: Planning Your Work and Time

Look over the syllabus and the course assignments, paying particular attention the timeline. Create a project calendar in Google Calendar and share it with each member of your group. As with all 3-credit University of Michigan classes, SI 501 expects up to an average of nine hours of work a week *outside of class*.

Most Discussion sections will provide time for each team to meet. But, that time may be used for other activities, and 1 hour in any case may not be enough. Because everyone’s schedules fill up quickly, it is *strongly recommended* that you schedule weekly meetings as soon as possible. At least 1-2 hours every week when the whole team can work together is recommended. (You can always cancel meetings later, if you don’t need them.)

In addition, the following tasks tend to require a lot of team time outside of class…

* Interviews and observations with clients. (These usually take place in pairs, not as a whole team.) Each interview may take between 60-90 minutes.
* Post-interview interpretation sessions. These should take place soon after each interview. They take about the same amount of time as the interview (i.e., 60-90 minutes).
* Affinity wall. This is a big assignment and may take anywhere from 6-12 hours. (Some teams report taking as much as 16-18 hours, though that usually means they could have found a way to work faster.)
* Presentation and final report, depending on how your team works.

#### Part IV: Communication Plan

Discuss and agree to the ways in which you will communicate as a team. It’s up to the team to decide how strictly to reinforce the rules you create, but it’s helpful to have them written down if team members depart from expectations. (Note that most of the electronic communication from your instructors will be via email.)

1. Day and time of weekly team meetings: Team meetings will take place on \_\_\_\_\_\_\_\_\_\_s at \_\_\_\_\_am/pm. Or, if you expect to plan these meetings week-to-week, then the protocol for scheduling is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.
2. Team meetings will happen online/in-person/a combination. If we have hybrid meetings (with some people in person and some people online), here are the things we will do to ensure that everyone’s voice is heard: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. Everyone will check email \_\_\_\_\_\_\_ times a day, at these times (e.g., morning and evening; morning, midday, and evening; before bed; etc.): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
4. Email / text / phone call / Slack / other is the preferred communication method. For urgent matters, communication should proceed by Email / text / phone call / Slack / other.
5. If a team member sends communication requiring a response, we will all strive to respond within \_\_\_\_ hours.
6. If a team member realizes she or he will not be able to complete a task on time, she or he should \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. In case of an emergency situation, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.
7. For each team member: Reflect on your own work style (e.g., quiet/vocal, happy to lead / happy to follow, etc.) and any special circumstances (e.g., different time zones, part-time work, poor Internet access at home, disabilities that affect mode of work, etc.). Then, mention what you plan to do to mitigate any challenges, as well as what you would request from other team members.

* [Example (delete after reading)] Amy: I know I tend to be vocal, so I will try to make sure everyone else has a chance to speak in meetings. I work part-time and also have two kids who are at home all day during the pandemic. So, I may be late to meetings and you may see my children pop up during calls. But, I am committed to pulling my weight on the team.
* [Example (delete after reading)] Ben: I might be a little quiet in meetings, but I am a diligent worker. I appreciate it when others check in with me during meetings, in case I have something to contribute. Some people tell me I am a perfectionist and that I worry too much about small details – if you think that is happening, please just let me know. I’m based in China, so I would appreciate if team meetings could happen in the mornings or evenings Eastern Time.
* <add a bullet for each team member here >

1. When a team member does not complete an agreed-upon task on time, the consequence will be \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. (Examples: Do extra work for the team. If meeting in person, buy everyone coffee at next meeting. Etc.)
2. The second (or any subsequent) time a team member does not complete an agreed-upon task, the consequence will be \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

**Part V: Expected Team Behaviors**

Fill in this section to discuss other policies for the team.

**a. Process for Taking and Sharing Meeting or Interview Notes**

**b. Process for Preparing Team Assignments**

**c. Other Team Expectations**

These could be about how to provide feedback (positive and negative) to one another; how much scheduling flexibility the team allows; what the team expects when a member fails to complete an agreed-upon task; etc. If you expect to have meetings where some team members are in person and some are virtual, you should discuss how such meetings should be run; think, in particular about ensuring that the people who are virtual can be sufficiently heard.

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1. You don’t need these if your team agrees to meet in person all the time. But, you might want to prepare these if you think you might need to meet on Zoom occasionally. We recommend that these be the Zoom “Personal Rooms” of two separate team members. Every U-M student can create a licensed Zoom account: <https://its.umich.edu/communication/videoconferencing/zoom/getting-started>. These accounts don’t have the limits of the free version of Zoom. [↑](#footnote-ref-1)