
Collaborating effectively

How to start, maintain, and sometimes end research collaborations

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Collaborating with other academics

Starting a new collaboration: Before saying yes

Factors to consider

- Do you have time?
- Do you *really* have time?
- Will it advance your research program and/or career development?
- Will you have a productive, mutually beneficial working relationship with the potential collaborator(s)?
 - Are your work/communication styles and research skills a good fit?

Starting a new collaboration: Before saying yes

Tips

- Wait *at least* a day before agreeing
 - “This sounds exciting ... Let me think about it”
 - “... Let me look at my upcoming commitments and make sure I have time”
- Set up a couple casual meetings before committing to collaborating
 - Make it okay for you and/or the potential collaborator(s) to back out after those meetings

Starting a new collaboration: Before saying yes

Tips

- Understand their timeline, expectations for the project, and envisioned roles
 - Make sure you are on the same page
 - If one person is more junior and seeking mentorship, discuss what kind of mentorship will be provided ahead of time
- If you have misgivings... don't move forward!
 - Always easier to pull out sooner rather than later

Saying no

- It can be simple and gracious, e.g.:

Hi [x],

This sounds really exciting – such a cool idea! I think I will pass because for major (and amazing!) projects like these, I prefer to invest in *[specific methodology]*. Also, I've got a lot of balls in the air, and I don't want to drop one while picking up another...you know how that goes. Thank you so much for thinking of me. I wish you amazing success with this and I'd love to hear more as you progress!

- If it seems like a good opportunity and you just don't have the bandwidth, you could suggest someone else (e.g., a student or labmate)

Starting a new collaboration: Asking someone to collaborate

- Do your homework first: Know what expertise (methods or content) you are looking for
- Conferences
 - Go up after potential collaborator's talk and strike up a conversation, email afterwards
 - Be upfront. “I love your work and wanted to talk to you about a potential collaboration”
 - Otherwise people may not be sure why you are telling them about your project; may elicit defensiveness
- Otherwise, email and see if they are interested in setting up a call or meeting at next conference

If they say no

- Don't take it personally – might be a timing or prioritization issue, or that they are going a different direction with their work
- Then you can suggest them as reviewers!

Once you're both in

- If you haven't already, make sure you have set expectations regarding the pace of the project, who will do what, and how often you will meet
- Discuss authorship order up front
 - If you want to allow this to be flexible depending on how the project goes, set up the criteria in advance for how it will be determined (e.g., using APA authorship scorecard)

Once you're both in

- Communicate about your deadlines, timelines, and obstacles – better to be transparent than to ghost/make people chase you
 - “I will be unavailable to meet/provide feedback between [date] and [date] due to [X].”

Once you're both in

- Communicate about your deadlines, timelines, and obstacles – better to be transparent than to ghost/make people chase you
 - “I unfortunately have to take a step back from our work together...[briefly explain issue if you want to, or just allude to challenging circumstances]... It’s definitely frustrating to have to write this email because I am super excited about our project and about working with such an awesome team, but I wanted to share my current situation with you all so that you know where I’m at. [I will be ready to resume our work at X time / I will reach out at X time if I’m in shape to dive back into our work together ...]”

Once you're both in

- Communicate about your deadlines, timelines, and obstacles – better to be transparent than to ghost/make people chase you
 - General framing: I'd like to tell you what's been going on with me and make sure that we are on the same page about the progress of our collaboration over the next few months

Ending a collaboration

- It's not worth your mental health to stay in a collaboration that isn't working
- The “slow fade” can work if both collaborators have other priorities or if the collaborator is super busy/not that responsive anyway
 - NOT ghosting – don’t leave them chasing you (unless that’s the only way)

Ending a collaboration

- Otherwise, an email or a meeting to discuss leaving the collaboration
 - Similar to previous example, “I unfortunately have to take a step back from our work together...”
 - Or you can always cite bandwidth
 - If the collaboration is great but the project isn’t working, bring it up! Other collaborators may also be wanting to call it quits
 - If there is something you can salvage (e.g., a small review paper from initial lit search), that can be a helpful resolution
 - Make sure you are clear on what will happen with data or authorship in the future

If you feel trapped in a toxic collaboration

- Seek support – someone outside your department or someone you trust
 - Ombuds can be a good resource
- Is it possible for you to add another collaborator to the project and work primarily with them?
- Create an exit plan – for leaving or wrapping up the collaboration ASAP
 - Concern about burning bridges does not justify staying in a collaboration harming your mental health

Collaborating with outside partners

Reaching out to outside partners

- Don't be afraid to ask: cold emailing can work!
- Be prepared to be persistent to find the person who can work with you
- Use connections
 - If you can connect to one person at an org, helpful to have someone on the inside supporting you

Starting a collaboration with outside partners

- Seek out collaborators with research background or experience working with researchers
- Make sure your methods-musts boxes are checked *early*
 - If it's an experiment, make sure they are on board with random assignment ASAP
 - Sample size, data access, timing
- Write up a Memorandum of Understanding (MOU) as first collaborative work together

MOU often includes....

- Design of the study
- What are the deliverables, who is responsible, and by when
 - If the partner is going to send you data or materials, consider building MOU around that so that your work does not begin until you receive those
- Communication expectations
- Who is responsible for different costs
- Publication rights
 - Make sure you have the right to publish even if they don't like the results
- Legal stuff – IP, proprietary info, etc.

Be extra discerning

- Have several meetings to discuss project and create MOU
- If red flags emerge (communication challenges, cold feet on key methodological components), consider ending the collaboration
 - “Might not be a good fit given our research team’s specific needs and timeline”
- If they approach you, make sure it is truly a research or career development opportunity
- Make sure your goals are aligned or synergistic

Play to your strengths

- You: the expert in research methods and statistics
- Them: the expert in their context, what can be successfully implemented, what will work or not work in their context
 - Strongly consider collaborating or getting feedback on materials