Tips for Forming Collaborative Teams

Here are some things to think about when you are forming your planning team:

- Consider establishing a dedicated and permanent team (or teams).
- You should identify the core planning team to include deploying/receiving subject matter experts (SMEs)/liaisons.
- Ensure that your planning team collaborates with other planning teams within the planning community of interest.
- Ensure that team members are familiar with the planning process that you are using.
- Establish level of involvement for extended planning team members who will provide technical expertise and inputs.
- Identify specific planning team standard operating procedures (SOPs):
  - Identify primary and secondary team members.
  - Identify meeting locations.
  - Identify administrative or logistical information:
    - How to access the meeting facility
    - Is a clearance required
    - How will the group keep a record of the meetings
  - Implement operations security (OPSEC) procedures.

Here are some tips that will help ensure that your planning meetings are successful.

**Plan ahead.** All members of the planning team should have advance notice of where and when the planning meeting will be held. It may be helpful to ask the members of the planning team for times that they are available or for suggestions for the location.

**Provide information about team expectations.** Planning team members should discuss and identify why participating on the planning team is important to their own agency and to the community itself. Show team members how their contributions will lead to success. In addition, budget and other project management concerns should be addressed early on in the planning effort. You should also provide information about timelines for deliverable, briefings for senior leadership, and the end products of the planning effort.
Ask the senior elected or appointed official or designee to sign the meeting announcement. A directive from the executive office carries the authority of the senior official and sends the message that the planning effort has the support of the senior official and his or her office.

Allow flexibility in scheduling. After the initial meeting, not all team members will need to attend all of the meetings. You can set up a task force or subcommittee to complete parts of the planning effort.

Consider using external facilitators. Third-party facilitators can help to keep the planning efforts focused and help to mediate disagreements.