1. Before the first meeting
Leaders play critical roles in ensuring their team works well together and the research outcomes meet participants’ expectations. The first and most important role is work done well in advance.
- Lay the foundation.
- Develop a goals-based agenda.

2. Identifying priorities, expertise, and desired outcomes
The first team goal is to learn to be creative together. Learning to do so requires trust and openness among the team, which comes once they understand and value what each member brings to the project; their differences in epistemologies, language, and beliefs; and the range of perspectives on priorities and desired outcomes.
- Launch the meeting and desired outcomes.
- Allow participants to define expertise.
- Open the problem up for refinement and iteration.

3. Reaching agreement on paths forward
The team re-engages and begins the process of moving from individual understandings or conceptualizations (“mental models”) of the research problem to a team consensus. Individual members recognize then share their mental models of the problem. Extensive and often facilitated discussion of the diverse models helps reveal tacit and explicit knowledge that each member brings to the table. And it readies the group for moving beyond one model (e.g., taking the pre-meeting planning process seriously helps avoid significant problems down the road.).

Teams often feel “tempted” to skip this step and move directly to data and analyses. This can lead to concerns, confusion, and conflict.

On timing ... groups vary in the amount of time they need to spend on each of the activities outlined in this infographic.

There is a voluminous literature on mental models from a variety of fields.
the leaders) or just “linking” understandings (e.g., as in multidisciplinary research) to the development of an integrative team model.

- Prepare the team for re-engagement.
- Elicit individual mental models.
- Recognize diversity in mental models.
- Facilitate co-development of a shared mental model.

4. **Linking the shared mental model to project tasks**

Now that the team has reached some agreement on a shared mental model of the research problem, they are ready to begin asking what information is needed to address this problem and how should it be linked or integrated. This may or may not involve discussion of actual analyses. The team may want to develop multiple paths forward since there are diverse perspectives on every socio-environmental problem (i.e., a “family of solutions”) and each may require different types of information or ways in which it is integrated.

- [Prepare the team for re-engagement.](#)
- [Identify project tasks and begin work specific to the project.](#)
- [Review accomplishments and assign tasks.](#)

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**Further Resources**