

Collaborative Writing for Catechism-Based Teams

3-Paragraph Order

Situation

Asynchronous and remote collaborative written projects (research, field guides, code, etc.) in emergent, interdisciplinary teams can be an incredibly productive and enjoyable pursuit. The convergence of diverse perspectives, personalities, and expertise in the rapid production of written deliverables can provide immense value and insight, not just to situation, problem, or opportunity space the team was formed to address, but also to the disciplines each author brought to the table.

Yet, asynchronous and remote collaborative writing can also be rather perilous. Managing deadlines, handling disputes, communicating, staying on mission, managing resources, collective editing (and over-editing), and avoiding contradiction are only some of the challenges. While the presence of a catechism-styled operations order ¹ and the use of a team “Facilitator” can greatly improve the likelihood of success, making sure all of the authors have an alignment on protocol and etiquette while writing as a catechism-based team prevents unnecessary misunderstandings and keeps things on schedule.

Procedures and Protocol

There are a few basic procedures, processes, and protocols that can prevent a good team from going off-the-rails during the work or before the work even begins, and others which increase the likelihood that the products of the work find a home and have impact.

Before the Project Starts

- **Read the Catechism.** Whether the team formed around an existing catechism or the catechism is being co-created by a team, make sure you read it fully and carefully. If something is unclear or information you needed was missing, get clarification from the Facilitator but make sure to suggest or request an edit. Make sure you are okay with everything, and where you aren't: make suggestions or request an edit.

¹ For more information on Catechisms and Facilitation please see the Facilitator's Catechism Playbook found at <https://zenodo.org/record/4579414>



- **Be Aware of What is Expected of You.** If after reading the catechism you aren't sure of what it is that is expected of you, ask for clarification. The facilitator, and really the whole team, will be there to assist you or clarify expectations and you should communicate with them to help co-create those expectations based on your capabilities and availability.
- **Submit Resources.** If there is a body of work you want to build off of, or if you are coming from a discipline that has a limited overlap with others in the group—it isn't just polite, but a necessary protocol to submit onboarding material, meta-analyses, and other resources to the rest of the group. This kind of sharing of material helps convey your perspective as a team member, and build a shared language.
- **Converge on a team Writing Approach.** There are at least five primary (effective) collaborative writing styles, which can be mixed together and also developed on:
 - **Single Primary Writer:** One person writes, everyone else plays other roles (support, editing, research, graphic design etc.)
 - **Partition Writing:** Each author works on a separate part, subject to editing by others or by common facilitator. May be parallel (Parallel Partitioning) or consecutive (Linear Partitioning)
 - **Joint Writing:** Authors work together synchronously and asynchronously in close collaboration on every part.
 - **Scribe:** One person writes based on group discussions, conclusions, and notes.
 - **Hybrid:** A blend of methods above or the partitioning of the document into sections written in one of the methods noted above. For example, the writing of the introduction and discussion sections using a Joint Writing method, but the rest of the work being written using the Partition Writing method.

If no method has been chosen, pitch one to the facilitator or the team—while some groups get lucky and fall into success, picking a method can circumvent a variety of conflicts during the work. See further reading for more information on team writing approach classifications.

During the Project

- **Make Distress Calls.** Never feel shy about making a distress call to the team or to your Facilitator. The Facilitator's job is to handle distress calls. If an error or challenge is recurring, ask for or suggest a protocol.
- **Respond to Distress Calls.** If your team has more than 2 collaborators, then beware of the bystander effect ("Someone else will handle that"). Everyone has been guilty of this at some point, but remember that the first person to raise their hand and help, is usually the first person to be invited back.
- **Document Changes.** Changes to approaches, processes, and expectations are good, but they need to be declared and compared to the original or most recent catechism. Documentation of changes reliably prevents mission creep and drift—not documenting them



reliably creates it. Documenting updates to the project will also help with team learning and institutional memory through deep time.

- **Define and Declare.** Where terms, claims, or objectives are muddy, make sure to ask for clarification—and where clarification is given, make sure the team puts it in writing (in the catechism, writing draft, notestream², or other formal document).
- **Keep Figures in a Common Repository.** Managing a product's figures and graphics can be a surprisingly frustrating process. Always makes sure to keep the most up-to-date figures and graphics in a common repository. Tip: use a common slide-presentation file as the repository in order to keep order maintained as well!

After the Project Ends

- **Ask for Feedback.** Collaborative writing is an infinite game for the collaborators and facilitator. Everyone is learning together. Make sure to reach out privately to the facilitator and other team members and ask for feedback.
- **When Asked for Feedback, Give Critique and Positive Feedback** (in that order). Collaborators and facilitators will often ask for feedback after a project is completed. If asked, you should always respond with honest, constructive critique first, followed by positive feedback.
- **Hotwash/Debrief.** After the product is complete, it's often up to the facilitator to “take the product to market”, ensuring it gets submitted for publishing etc. However, it is incredibly important to have a debrief, concluding meeting, or “hotwash”, to go over what's going to happen next, when/if the team should meet again, and to give everyone an opportunity to recommend future work or discuss opportunities to get feedback on or publicity for the product.

Etiquette

While none of these items are explicitly “required”, they nonetheless help keep the work running smoothly, reduce stress on team-mates (and your facilitator), and make you a stronger and more effective (and more sought after!) collaborator.

Before the Project Starts

- Don't Overcommit. It's better to underestimate what you'll have time to contribute and work on and be a hero than overestimate and cause pile-ups and missed deadlines.
- Sharing the Catechism if it is Collaborative. If there's someone else that you think may be able to contribute to the work, share it with the team! If a call for a team appears to be private or

² A Notestream is a shared, common document for thinking out loud, writing notes, collecting references, and drafting outlines.



attached to an organization, ask the facilitator if you can share the catechism with someone invited to collaborate.

During the Project

- Keep the Project Mission-Focused. Team members will be coming from many different perspectives and may live in quite different worlds—for the duration of meetings and work on the project, try to keep a mission-focus and limit discussion about unrelated, potentially polarizing topics.
- Make Best Effort to Attend Sync Calls. Common language and a stable relationship is necessary for effective collaborative writing (especially necessary when using Joint Writing methods), and the formula for common language and a stable relationship is proximity, frequency, and reliability. In larger teams it may seem inconsequential to miss weekly or biweekly synchronization meetings, but it could mean a loss of your voice in the product or worse, a significant surprise for your team later down the road (“I thought we all agreed on this”).
- Make Best Effort to Provide Asynchronous Updates. Through email or agreed-upon text platforms, keep the team in the loop with what you are working on, struggling with, or thinking about. This may spark others to increase their participation in the project by integrating challenging topics at their own pace, rather than e.g. live during a video meeting.
- Don’t Throw Curveballs (Often). There are few worse feelings in collaborative writing than getting to the end of a project and having someone throw a curveball that could cause cascading changes. However, sometimes curveballs are creative injections into the team’s process, or simply unavoidable—in these cases, take impacts on current work into consideration and remember that this is why it’s important to have a resilient and aligned team that can adapt to changing circumstances.
- **Share Work in Progress, and Don’t Edit too Early.** Everyone writes differently. It’s quite common for writers, especially those who are inexperienced or shy about collaborating, to write somewhere else and then push blocks of completed text to the document—but when people are thinking while writing in a shared doc, it’s important to give them some space. After many collaborations, some writers will find it much easier to write synchronously—even in the same paragraph! But if they’re not there yet: give them time and give them space. If you’re writing separately, don’t spend too long incommunicado! And if you’re stuck, ask for help!

After the Project Ends

- **Be a Good Shepherd.** After the product is done and published, it’s important to be a good “shepherd” for the work. Direct people to it, place it where it can be seen, and add kind words for the other collaborators.
- **Stay in Touch.** It’s good to stay in contact with your former collaborators!



Further Reading

- [Territorial Functioning in Collaborative Writing, Larsen-Ledet & Korsgaard 2019](#)
- [Empirical Study on Collaborative Writing: What Do Co-Authors Do, Use, and Like?, Noel and Robert 2004](#)
- [The Great Preset: Remote Teams and Operational Art, Friedman and Cordes 2020](#)
- [The Facilitator's Catechism Playbook, Friedman and Cordes 2021](#)

