

Engagement Plan Template

Version 1.0

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For CI Compass Distribution to Major Facility Personnel Only

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1 Contacts

Major Facility Point of Contact:

CI Compass Point of Contact:

2 Engagement Goals and Objectives

In this section, briefly state the larger goal you are trying to achieve (the problem you wish to solve), the scope of this problem, the larger objectives required to solve this problem, and the expected timeframe for completion.

Goal:

(The problem you are trying to solve as a part of this engagement.)

Scope:

(A statement of the mutually decided expectations and boundaries within which you and CI Compass agree to work, i.e., decisions about the breadth/depth of the project, influenced by the time frame, objectives, work required, and desired outcomes.)

Objectives:

(The broad objectives you would like to achieve as a result of engaging with CI Compass. Examples could include advising/assisting the major facility to address a pressing CI issue, developing prototypes or proofs of concept, researching particular topics, comparing and evaluating resources/hardware/software, developing plans or designs. More fine grained objectives can be identified at weekly meetings.)

Timeframe:

(Expected start and end dates)

3 Engagement Working Groups and Participants

Most major facilities find it useful to distribute the work across smaller working groups focused on particular aspects of the problem being solved. We suggest that each working group be led by a representative from the major facility and one from CI Compass. Please list any working groups you currently have or intend to form to conduct the work of this engagement. Please describe the working group briefly (e.g., its purpose, scope, or overall goals) and its team members.

Working Group Name:

Description (purpose, scope, goals):

Leaders:

Participants:

Working Group Name:

Description (purpose, scope, goals):

Leaders:

Participants:

Working Group Name:

Description (purpose, scope, goals):

Leaders:

Participants:

Copy the above to list additional working groups.

4 Expected Engagement Work Products

What types of work products would you like to see result from this engagement?

(A final report that summarizes the engagement activities is a mandatory work product. Other examples of potential work products include an article discussing lessons learned, prototypes/proofs of concept, research and evaluation of potential solutions for the CI issues, white papers, scholarly papers, joint community engagements planned, report of potential generalizable findings as a result of this engagement, architecture design documents, etc.)

5 Milestones

Anticipated Completion Date	Description of the Milestone

6 Confidentiality and Conflicts of Interest

We at CI Compass take your interests very seriously and promise to safeguard your private organizational information. Please review our [CI Compass Collaborator Information Confidentiality policy](#) for more about how we intend to fulfill this promise.

CI Compass also believes in transparency and invites you to review our [CI Compass Conflict of Interest statement](#) to learn more about any potential COIs with CI Compass leadership.

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