

PSA Project Needs Checklist

Introduction to this Checklist	1
The Needs Assessment Process	2
Identifying Needs	2
A. Funding	3
PSA Resources	3
Needs Assessment	4
B. Methodology	4
PSA Resources	4
Needs Assessment	6
C. Data Management	6
PSA Resources	6
Needs Assessment	8
D. Ethics	8
PSA Resources	8
Needs Assessment	9
E. Translation	10
PSA Resources	10
Needs Assessment	10
F. Logistics	10
PSA Resources	10
Needs Assessment	11
G. Project Monitoring	12
PSA Resources	12
Needs Assessment	12
H. Writing	12
PSA Resources	12
Needs Assessment	13
Completing Needs Assessment: Official Acceptance by the PSA	14

Introduction to this Checklist

Congratulations on the provisional acceptance of your study by the PSA! The next steps prior to official acceptance are to complete this needs assessment process and have in place all products outlined in the closing checklist on the last two pages.

We developed this needs assessment process because PSA projects require a great deal of coordination and a large number of tasks. In order to help you plan your project, we've created this checklist of issues you will need to consider to carry out your project. This checklist has two goals. First, this checklist is meant to share our institutional knowledge about what tasks you will need to complete and thereby help you to identify possible pain points in the process. Second, the checklist will be used to help assemble the project's personnel, or the core team who you will work with to actually carry out your study and to determine how much support is needed from each role. This core team will be comprised of the team leads — the authors on the proposal you submitted to the PSA — and PSA personnel — the PSA members assigned to your project from PSA committees. We hope that all projects that reach this stage are completed successfully. This process is designed to maximize the likelihood of that success.

The checklist is organized by aspects of your project associated with PSA policies (Methodology, Funding, Translation, Ethics, Data Management, Project Monitoring, Logistics, Writing). We will ask you to answer a few questions about each aspect and then indicate the level of support you'll need to accomplish your project, as follows:

1. Minimal support needed - You, as the team leads, will execute this part of the project. You are able to carry out these tasks and abide by PSA policies. A PSA member may be assigned to oversee part of your project (to ensure compliance with PSA policies and projects) but will not have an active role in your project and will not gain authorship on resulting manuscripts.
2. Selective support needed - You, as the team leads, will execute most of this part of the project but will likely need some additional expertise or input. At this level, a PSA member will be attached to your project and will help guide a particular portion of it and/or facilitate you getting feedback from the relevant committee. This person will gain authorship on resulting manuscripts, likely as part of one of the lower tiers. This is the most common level of support from the PSA.
3. Consistent support needed - You, as the team leads, need more active involvement or supervision to help you execute this part of the project. At this level, we will use your responses on the needs assessment to identify a PSA member(s) that has the skills to help with the tasks where you need the most assistance. This will result in authorship for those PSA member(s), likely in one of the higher tiers.

Our baseline assumption is that you as the team leads will take responsibility for executing tasks for aspects of the project for which you indicate "Minimal support needed." However, for aspects

of the project for which you indicate that either “Selective support” or “Consistent support” is needed, PSA members will play more active roles in helping to execute tasks.

The Needs Assessment Process

Here are the steps of the full needs assessment process, in chronological order:

- ❑ Team leads will be provided with a list of PSA policies they are expected to follow during their project. They are responsible for reading the policies and indicating if any policies will be impossible to follow or unnecessary for their project.
- ❑ Team leads will provide answers to the questions in the checklist below. Answers can be very brief. We simply need a condensed overview of anticipated needs to share with the network and locate any necessary, additional personnel.
- ❑ The completed checklist will be shared with relevant PSA committees. They will use your answers to identify a) how much support they will need to provide and b) who will be providing that support.
- ❑ The team leads will have a video conference call with the PSA Director(s) and a representative from each of the relevant PSA committees to discuss the project. The main point of this meeting will be making sure that there are plans and personnel in place to handle anticipated challenges.
- ❑ All key project personnel will be identified by the proposing authors and the Director of the PSA. All key project personnel decisions should be noted in the collaboration agreement.

Although the process described above ends with identification of key PSA project personnel, we fully expect that, as projects evolve, so might the involvement of members of the project team. For instance, you may indicate needing minimal support for an area of your project but later decide that you would like more involvement from a PSA member. This is fine, and should be negotiated with the PSA member(s) in question. We ask that both parties agree to an amended collaboration agreement in these instances. This will help to ensure that all collaborators have the same expectations about their involvement.

Identifying Needs

Please respond to all prompts in each section below. Record your responses in the light gray field below each one.

A. Funding

PSA Resources

The committee most involved with these aspects of the project is the Funding Committee. This committee oversees efforts by the PSA to obtain funding for our general operation. They also have experience in applying for funding and may be able to help you find funding sources for your application. [Link to policy doc]

1. What expenses will data collection labs incur, if any? (e.g., does the study require that participants be compensated with money?)

2. How much money, if any, can you contribute to the project? (for participant hours/materials and/or for a small stipend)

3. Beyond what you can contribute (if any), how much additional money would be required to complete this project? Have you submitted a grant to cover project costs?

- a. (if “no”): Would you like to collaborate with the PSA to submit a grant to cover project costs?

- b. (if “yes”): What is the funding source? What is the expected timeline for grant submission and award notification?

4. Do you have funding for support staff (from the PSA or otherwise) if needed?

5. If you anticipate working with a budget, who will take charge of the accounting process?

6. Do you think it would be useful to have a member of the funding committee assigned to join the project team? The answer here may depend on the extent to which funding is key to the success of the project.

Needs Assessment

For the Funding portion of your project, which level of support would you like to receive?
(Minimal / Selective / Consistent)

B. Methodology

PSA Resources

The committee most involved with these aspects of the project is the Methodology Committee. This committee specializes in study design and analysis. [Link to policy doc] The information provided here is also relevant to the Logistics and Project Monitoring Committees.

7. Participants

- a. Are there special requirements for some/all participants?

- b. Can you instruct collection teams on how to recruit and collect those participants?

8. Procedure

- a. Can you train your collection teams to carry out your study procedure?

- b. Will your collection teams need any specialized or technical knowledge to carry out your study's procedure?

- i. Are you able to teach them that knowledge?

- c. Will your procedure require any specific accommodations (e.g., physical materials, tech demo, etc)?

- d. Will collection teams need to carry out specific actions before running participants that, if not carried out, would invalidate the data (e.g., setting a random seed, delivering specific verbal instructions)?

Can you provide detailed written instructions to ensure that collection labs complete all necessary actions?

9. Materials

- a. What kinds of software will data collection labs need to use to administer the study? (e.g., formr? jsPsych? Qualtrics?)

- i. Can you provide this software if needed?

- b. Are you capable of making the necessary materials (e.g., programming formr)?

- c. Are any of the materials proprietary (i.e., protected by copyright and/or require a license)?

10. Analysis plan

- a. Do data collection labs need to carry out and data processing, cleaning, and/or analyses? If so, what steps will they need to carry out?

- b. Are you able to train them and/or provide the necessary syntax or code to carry out the above?

- c. What analysis software will be used? Note whether any of the software must be paid for or poses cross-cultural barriers (e.g., can't be used due to the Great Firewall)

- d. How will the lead authors share materials and analysis scripts? (see Data Management)

- e. Can you finalize the research design of the study?

- f. Can you write a detailed analysis plan for the study, including the necessary statistical software scripts?

- g. Can you perform a power analysis and/or create a sample size plan for the study?

- h. Briefly, where and how will the lead authors preregister this study?

Needs Assessment

For the Methodology portion of your project, which level of support would you like to receive? (Minimal / Selective / Consistent)

C. Data Management

PSA Resources

The committee most involved with these aspects of the project is the Data Management Committee. This committee has expertise in organizing and managing datasets and is familiar with the PSA policies regarding data sharing and usage. [<https://psyarxiv.com/buqyc/>]

15. What is the lead author team's plan to produce machine-readable data files?

16. Are you familiar with the OSF? This is the platform PSA projects typically use as a repository for materials and data.

17. Will data be collected in one central location across data collection sites, or will each site collect and store the data locally during the data collection phase? If the latter, what is your plan for retrieving all of the data?

18. Who will have access to the data during the study?

19. Will the data be retained indefinitely? Will the deidentified data be made accessible in a public repository at the conclusion of the study?

20. Do European Union General Data Protection Regulation (GDPR) policies apply to this study? (<https://eugdpr.org/>)

- a. How confident are you of this assessment?

21. What steps do we need to take to ensure that every participant has the right to be forgotten, which means deleting their data? Is there a point at which it would be difficult/impossible to delete data? Who will be authorized to delete data and how will it be documented, if applicable?

22. What will be the train-test split of the data set for cross-validation, if applicable?

23. Upon review of the data release policy, can you write the data release plan for the study (see the “Data Release” section of this document <https://psyarxiv.com/buqyc/>)?

24. What is the plan for publishing the dataset as a citable object?

25. Who will be responsible for publishing the dataset as a citable object?

26. Who will be responsible for correspondence related to the published dataset?

Needs Assessment

For the Data Management portion of your project, which level of support would you like to receive? (Minimal / Selective / Consistent)

D. Ethics

PSA Resources

The committee most involved with these aspects of the project is the Ethics Committee. This committee oversees the ethics approval process for PSA projects and has a great deal of experience anticipating and troubleshooting issues with respect to getting approval. [Link to policy doc]

27. Do you already have IRB approval for your study? If so, did you encounter any difficulties getting approval?

28. What locations will you need ethics approval in (particularly locations with different ethics rules and regulations)?

29. What are the risks of the proposed research? Categories of risks to consider: physical, psychological, social, economic, legal, loss of confidentiality. Are some participants or data collection sites more vulnerable to one or more risks? What steps will you take to minimize these risks in the PSA context?

30. Can you train your collection teams on any required consent and/or debriefing processes?

31. What steps will be taken to ensure confidentiality? Will any personal identifiers be collected from participants? Will identifiers be stored with data? Do you feel confident that you can create an adequately confidential dataset?

32. Could this project be determined to be “exempt” from IRB oversight (e.g., in the US, psychology studies that use benign behavioral interventions may be exempt according to the new Common Rule)?

33. What hurdles do you anticipate that you or other labs may face when it comes to obtaining ethics approval to conduct this research?

34. Do you have the capacity to consult with individual sites to gain approval?

Needs Assessment

For the Ethics portion of your project, which level of support would you like to receive?
(Minimal / Selective / Consistent)

E. Translation

PSA Resources

The committee most involved with these aspects of the project is the Translation and Cultural Diversity Committee. This committee oversees translation processes involved in many PSA projects. They have experience translating materials into several languages and with the overall process of effective translation. [Link to policy doc]

32. Which languages will study materials need to be translated into?

33. Can you translate the study materials into the necessary languages?

34. What is the estimated word count that will need to be translated?

35. Do you have experience translating study materials?

Note: You will need to submit your entire study, including all instructions to participants, for translation. Consider including all of these instructions in your ethics protocol so that you've thought through all of the language that will need to be translated.

Needs Assessment

For the Translation portion of your project, which level of support would you like to receive?
(Minimal / Selective / Consistent)

F. Logistics

PSA Resources

The committee most involved with these aspects of the project is the Logistics Committee. This committee has expertise in recruiting for large collaborations and ensuring that projects are staffed and equipped for studies.

36. How much proactive lab recruitment do you think will be necessary (e.g., if you need to oversample some world regions/populations of participants)?

- a. Do you feel confident that you can recruit the necessary teams?

37. Are there any procedures to be instituted before or after an in-person laboratory session? (e.g., prescreen at the start of a semester via SONA, online survey).

- a. Can you train your collection teams to institute these procedures and/or provide them with the resources necessary for these procedures?

38. The PSA typically expects lead authors to create a data collection video that demonstrates a study session from start (welcoming (e.g., prescreen at the start of a semester via SONA, online survey)).

- a. Can you train your collection teams to institute these procedures and/or provide them with the resources necessary for these procedures?

Needs Assessment

For the Logistics portion of your project, which level of support would you like to receive?
(Minimal / Selective / Consistent)

G. Project Monitoring

PSA Resources

The committee most involved with these aspects of the project is the Project Monitoring Committee. Project monitors monitor, encourage, and track progress on PSA-supported projects. This includes confirming that PSA projects adhere to important policies (e.g., ethics approval at every site, paper available as ‘Green OA’). Project monitors will support the use of a project tracking spreadsheet to maintain a big-picture view of the current status of a project. [A draft of the PM policy document \(unratified\) can be found here.](#)

38. Who on the author team will take primary responsibility for coordinating this research?

39. Who will be in charge of providing project-wide updates?

40. Do you have a plan for having someone available to answer collaborator emails/questions at all times?

41. Who will be in charge of monitoring and updating your project’s tracking sheet?

Needs Assessment

For the Project Monitoring portion of your project, which level of support would you like to receive? (Minimal / Selective / Consistent)

H. Writing

PSA Resources

The people most involved with these aspects of the project are members of the proposing author team. Project Monitors also typically help proposing authors navigate the submission process.

On some projects, Project Monitors become part of the lead author team, taking primary responsibility for organizing the writing and revision process. Moreover, members of the Methodology Committee may become part of the lead author team, taking primary responsibility for describing analyses and results.

42. Do you feel comfortable creating a written collaboration agreement for all collaborators? (We can provide examples of existing collaboration agreements.) Would you like help writing a collaboration agreement?

43. Who will be responsible for the primary writing for your project and how will their work be credited?

44. How confident are you about managing the revisions process with many authors?

45. Who will be responsible for communicating with journal editors about embargoes on releasing preprints or talking to the press?

Needs Assessment

For this portion of your project, which level of support would you like to receive? (Minimal / Selective / Consistent)

Completing Needs Assessment: Official Acceptance by the PSA

The following products must be in place to move a project from provisional acceptance to official acceptance. The proposing author team has the primary responsibility for producing each item, but the PSA will collaborate with them on this work, and PSA representatives listed here are responsible for ensuring each product is in place.

- ☐ Proposing authors have read and agreed to PSA policies.
-Director
- ☐ Responses to the needs assessment survey highlighting the outstanding needs of the project (a list of things that we don't want to fall through the cracks) and a plan to address them
-Director
- ☐ RR quality draft approved by all project personnel
-Proposing author team, ethics manager, translation coordinator, data manager, project monitor, methodologist, PSA leadership representative (any director)
- ☐ Check by the Study Selection Committee that all *critical* feedback raised in study selection has been addressed or there is a plan in place to address
-A SSC assistant director
- ☐ OSF page with necessary component structure and PSA contributors
-Project monitor
- ☐ Data management plan
-Data manager
- ☐ Translation plan and progress sheet
-Translation coordinator
- ☐ IRB materials approved at 3 or more sites
-Ethics manager
- ☐ Collaboration agreement
-Director
- ☐ Estimated project timeline with responsibilities of key project personnel
-Project monitor
- ☐ Tracking sheet
-Project monitor
- ☐ Target Journal
-Director
- ☐ Clearly articulated rights and responsibilities of all project personnel. Started as a structured conversation among all project personnel led by the PSA Director, with someone taking notes on emerging consensus, and then converted into a document of mutual understanding for the terms of work going forward. (including: expectations about intra-team communication (timing, mode — email, slack, asana, etc.), workflow, information transfer, meeting frequency, who sends mass emails (how much autonomy /

what is the system of drafting?), expectations about intra-team deadlines and team-wide deadlines, who is *the* lead, general authorship expectations/preferences, general conversation about how decisions are made by the team (i.e., all personnel)

-Director