Research Team and Environment Terms of Reference Template

Document Date, 2023
Next Date of Review / Update

Pre-amble (remove before submission): Please complete this document for all team members. It is valuable to consider opportunities and barriers to participation for all team members, including co-investigators, collaborators, technical staff, trainees, and patient partners. This is an example Terms of Reference; you can choose to submit a different Terms of Reference or modify to suit your project or program.

1.0 Background

Include a brief background on the project (including title, funder, duration of study and description)

2.0 Description of Team Roles

2.1 Role description

Include each role on the team, such as principal and co-investigators, trainees, collaborators, technical staff, and patient partners.

Provide a brief description of what each individual will be asked to contribute. Consider using the IAP2 spectrum of engagement or other similar framework to describe the level of engagement / responsibility. More details should be provided in 3.1 below.

Describe any support provided to each role and considerations for equity, diversity, and inclusion.

2.2 Logistics

Include specifics of the commitment for each role (as applicable):

- Length of term (i.e., in months or years)
- Estimated hours and frequency and total hours (if applicable)
- Other logistical requirements (i.e., attendance at certain meetings/events)
- Travel or other expectations

- Compensation (for relevant team members) – hourly rate or stipend, total estimated amount, policies followed, such as CCS Patient Partner Compensation Policy. Describe how payment will be provided to minimize barriers (i.e., paperwork, time to payment, flexible amounts) (if applicable)

Provide more information on supports offered (i.e., translation, technical support, accessibility, training, counselling, etc)

Define where to go if the individual has questions or concerns (including contact name, role, and information)

3.0 Roles and Responsibilities

3.1 Individual Responsibilities

Describe each role responsibility. Include:

- Adherence to codes of conduct, ethics, confidentiality, ground rules, terms of reference, etc

- Contributions or activities (related to the research methodology (i.e., conducting experiments, obtaining informed consent, administering surveys), provision of feedback, sharing their story, writing reports, identifying issues, voting on decisions, etc) and how and when this should be provided; what each role will be involved in (i.e., meetings, document review, data collection, research prioritization, analysis, communication / knowledge translation)

- Necessary skills or competencies required or sought for each individual

- If there are any decision-making responsibilities

- How individuals are expected to interact or work with others

- Any barriers to participation, and how these will be addressed

- Anything else relevant to the role

Describe the process for removal of an individual from a role, if necessary

3.2 Team or Council Responsibilities

If the team operates as a whole, or there is a committee or council with specific responsibilities, describe the function and responsibilities of the group, term and other expectations.

3.3 Decision making process

Describe how decisions will be made among the team, in detail (does everyone get a vote, how votes are decided, who decides a tie, etc).

4.0 Research Environment (if applicable)

Describe the research environment, the resources, equipment, expertise, support and collaborations available to carry out the work, as well as any barriers and alternate strategies. Describe equity, diversity, and inclusion principles incorporated within the team environment.

5.0 Evaluation

Include evaluation of all participating individuals, preferably mid-way and at the end of the term to assess and improve on the team experience.

Describe what measures will be used and when they will be applied.

Describe how you will communicate results back to individuals, of both the project they contributed to and the evaluation.

For other templates and resources for reference, see CanVECTOR, SPOR, and other organizations.