Patient/Stakeholder Partner Terms of Reference Template

Document Date, 2022
Next Date of Review / Update

1.0 Background
Include a brief background on the organization or study (including title, funder, duration of study and description)

2.0 Description of Opportunity
2.1 Opportunity Description
Introduce the opportunity or role
Include necessary skills or competencies sought
Describe support provided and any considerations for equity, diversity, and inclusion

2.2 Logistics
Include specifics of the commitment:
- Length of term (i.e., in months)
- Estimated hours and frequency
- Total hours
- Type of commitment (i.e. meetings, document review, presentation, etc)
- Travel or other expectations

Provide a brief description of what individuals will be asked to contribute. Consider using the IAP2 spectrum of engagement or other similar framework to describe the engagement

Provide more information on supports provided (i.e., translation, technical support, accessibility, training, 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
- Each of their contributions or activities (provision of feedback, sharing their story, writing reports, identifying issues, voting on decisions, etc) and how and when this should be provided
- If there are any decision-making responsibilities
- How individuals are expected to interact or work with others
- Anything else relevant to the role

Describe process for removal of individual from role, if necessary

3.2 Council Responsibilities
If role is part of a committee or council, describe the function and responsibilities of the group, term and other expectations

3.3 Decision making process
If decision-making responsibilities are included, describe them in detail (how votes are decided, who decides a tie, etc).

3.4 Compensation
Describe the compensation provided for the contribution
Specify:

- Hourly rate or stipend
- Estimate the total amount if possible
- Cite or link to any policies on compensation available (i.e., CCS Patient Partner Compensation Policy)

Describe how payment will be provided to minimize barriers (i.e. paperwork, time to payment, flexible amounts)

4.0 Evaluation
Include evaluation of all participating individuals, preferably mid-way and at the end of the term to assess the engagement process

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.