WELLESLEY CENTRAL
PROMOTING URBAN HEALTH

Sample Terms of Reference Contract

A *Terms of Reference Contract* is a kind of 'memo of understanding' that you can use to guide the work of your CBR project. It is a document that should be co-created with all of your project partners. Creating a *Terms of Reference Contract*, gives your team an opportunity to ask: What does Community-Based Research mean to us? Why are we working together? What principles are underlying our partnership? And, how will we work together? Your Terms of Reference Contract should be something that each partner signs on to – but it should also be considered a "living document" – one that you can come back to and revisit throughout the life of your project.

The following is meant to be a guiding example. Each project and partnership however, is different and may require alternative language and approaches.

1. Purpose of the CBR Project

- **One sentence project description:** This research project is a community-based study committed to identifying/understanding/measuring...........

- **One sentence project goal:** The results of this study will be used to enhance quality of life through mobilizing community, building capacities, identifying programmatic gaps, and impacting social policy.........

- **Project objectives:** The project will achieve this goal by identifying specific factors that impact on quality of life and will put forth strategies for programme enhancement, community-building and policy change.....

2. Guiding Principles for the CBR Project

- This project will engage a set of principles that will foster community ownership and empowerment among team members, including power sharing, capacity building through mentoring and learning exchanges, group participation in all appropriate phases of the research project, and community ownership of the project.
- This project will engage in an open and transparent process where a collective vision of research goals and objectives is shared, and where the roles and expectations of team members are clearly understood;
- This project will be a collaborative and equitable research partnership where members draw upon individual skill sets to meaningfully and mutually work toward the team's vision;
- This project will provide opportunities for capacity building through "learning exchanges" where team members can learn about research skills, community development, and community work;
- This project will engage in data analysis interpretation processes that honour the lived experiences/knowledge of community members;
- This project will employ dissemination strategies leading toward education, advocacy, community benefit, and social change;
- This project will foster a supportive team environment through critical reflection of our work and group process.

3. Roles and Responsibilities of Project Team Members

This project recognizes that roles and responsibilities differ among Co-Principal Investigators, Co-Investigators, and staff, based on principles of equity, empowerment, capacity building, and collective ownership of the project.

- **Co-Principal Investigators' (Co-PIs) Responsibilities:** The Co-PIs will provide leadership in every aspect of the project with support from research partners (Co-Investigators). This includes overseeing the entire project, coordinating research team activities, managing the budget, reporting to funders, supervising staff, and ensuring the dissemination of research findings.

- **Co-Investigators' Responsibilities:** Co-Investigators (some of whom represent agencies and others bring individual expertise) will participate in all aspects of the research project, taking into account individual and organizational capacities, (skills, available human and other resources). Co-Investigators will participate in team meetings, learning exchanges, the formulation of research questions, provide suggestions and feedback on the methodology, and provide input on recruitment, data collection, data analysis and interpretation, and dissemination. Co-Investigators may also assist with data collection.

- **Staff Responsibilities:** Staff responsibilities will include team building (e.g., facilitating meetings and learning exchanges, liaising with individual team members), coordinating project administrative activities (e.g. minutes, meeting agendas) coordinating outreach to youth, service providers, and key informants, and setting up and conducting research interviews. Staff will also oversee the transcription of tapes and delivery of transcripts to the Co-Principal Investigators.

- **Other relevant partners, advisory, etc responsibilities**

4. Decision-Making Process for the Project

Our decision-making process in this project aims to:

- encourage the participation and empowerment of all team members;
- be transparent, open and clear;
- provide opportunities for exchanges of learning that draw on the various skills and areas of knowledge of different team members;
- recognize the responsibilities of the Co-Principal Investigators as Project leaders;
- recognize the responsibilities of the Project Coordinator as the Project's staff person.

Differing Responsibilities:

- Team decisions will include those related to the project's overall goals and strategies;
- Project leaders and staff are responsible for decisions related to the management of the research and administration to the Project.

Process for Team Decisions:

- Decision-making at Team meetings will strive first for consensus and then will use simple majority votes

5. Access to/Dissemination of Data

Based upon the project's guiding principles, the Co-PIs and the Co-Investigators share ownership and have access to the research data. Usage of the data will be in accordance with the project goals and will adhere to all requirements of the Research Ethics Board at XXXXX.

Data will be used for:

- advancement of knowledge;
- identification of future research questions;
- making recommendations for policy and service provision.

The data should not be for:

- individual interests that are not related to the goals of the research.

In accordance with CBR principles, we are proposing a model of dissemination that encourages the active involvement of all research team members while taking into account their varying responsibilities and capacities. Research findings will be disseminated in various ways including community forums, conference presentations, agency workshops, newsletters, and journal articles. The Co-PIs, the Co-Investigators, and the Project Coordinator are all encouraged to engage in dissemination of the research findings, and are encouraged to share information about potential dissemination activities.

The Co-PIs will take the initiative in identifying potential journal articles and discussing them with the team. Articles may be written by individuals or by writing groups formed to develop particular manuscripts. All members of a writing group will share authorship on a manuscript. If the paper discusses concerns or issues relating to a particular ethno-cultural community or communities, team members from these communities will be encouraged to participate in the writing group. Order of authorship and mechanisms for feedback on manuscript drafts will be decided up front by writing group members. Groups may also be formed for the development of conference presentations, community forums, and other dissemination activities.

6. Process Evaluation

We will regularly chart our progress against our timeline submitted. We will also provide time at then end of each meeting (15 minutes) to review our process. Twice a year, we will hold meetings specifically to debrief about our work. At these meetings we will both critically reflect on our process/outcome balance and make recommendations for adjusting our work accordingly.