



Research Team Memorandum of Understanding

Team Structure and Decision-Making

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These Memorandum of Understanding documents are intended to guide the work of the Trans PULSE Canada Study. While each team member agrees in principle with the Memorandum of Understanding, it is considered a set of "living documents," which may be revisited and revised throughout the life of our project.

Overview

The scope of a national research project requires an organizational structure that is intrinsically fluid and open to change and flexibility to accommodate the varying needs of both research team members, as well as to effectively engage diverse communities across Canada. Some guiding principles that are fundamentally requisite in doing a national project, wherein team members may be working in relative geographic and temporal isolation for extended periods are:

Clarity - The roles and responsibilities accepted by each team member must be clearly delineated at the outset and revisited necessarily as time progresses and said roles and responsibilities change.

Communication - Active updates and communication to and from Principal Investigators (PIs) and/or staff is essential to ensure that both timelines are met and that adequate support and clarity, when required, is available.

Flexibility - As inferred above, the particular organizational structure and workflows of both individuals and subgroups (e.g. Priority Population Consultation Teams (PPCTs), Working Groups (WGs), Authorship Teams) must be allowed to respond to the unique needs of the researcher(s) as well as communities. As an example, team members may be living in different time zones, with various disabilities and health challenges, and working in other capacities to survive - thus a flexible approach to self-driven organization is needed to effectively engage persons with a wide diversity of backgrounds and lived experiences.

The Research Team

The Project structure is more fluid and complex than the roles outlined on the CIHR grant application. This section details the structure of the Project and the responsibilities assigned to the various types of roles that individuals may hold on the Project.

Individuals who have been involved with activities of the Trans PULSE Canada research team (e.g. conducting research, involvement with WGs including PPCTs) within the past 3 months will be considered “active” members of the team. Individuals who have not been involved in research team activities within the past 3 months, but who have been involved in the past, will be considered “inactive” members of the research team. Inactive members may remain on Basecamp, however, anyone posting to Basecamp should consider that posts/attachments could be viewed by somebody not familiar with team policies around external communications. All internal/confidential documents should be marked as such. Team members permanently leaving the project will notify the project coordinator and/or PIs and will be removed from Basecamp.

Management Team

To ensure swift action is taken on time-sensitive issues, the Management Team (MT), consisting of the Project PIs and Project Coordinator, will deal with day-to-day tasks that arise over the course of the month. As larger issues arise, the MT will pass them on to the Steering Committee (SC), and they can be added to the next SC agenda or brought to the SC via Basecamp if time-sensitive. The MT meets weekly. MT membership can be expanded, as determined by the Co-PIs and Project Coordinator, based on their understanding of the work that needs to happen. As Principal Investigator, Dr. Greta Bauer will be responsible for grant finances.

Steering Committee

As noted in our [Mission, Goals, and Guiding Principles MOU](#), fundamental to both Trans PULSE Canada, akin to the preceding Trans PULSE study, is the assurance that key Project decisions are made by and in service to the trans communities with whom we are working. To achieve this, the central decision-making body of the Trans PULSE Canada project is a Steering Committee. The SC is responsible for reviewing and approving final major project decisions including, but not limited to: decisions related to survey design, recruitment, outreach, communication, membership, conflict resolution, knowledge translation, and publication priorities and strategies.

The SC is comprised of 8-12 persons and meets monthly, with additional meetings as necessary. The SC is comprised of a majority of trans-identified individuals and requires 50% + 1 voting majority of trans persons to make decisions. The SC typically strives for consensus in decision-making. Between meetings, the SC can use Basecamp for online discussion and decision-making. When appropriate, the committee may choose to implement an online “e-vote” for decision-making, where all SC members can vote or indicate their abstention from the vote.

The SC has a mandatory videoconference on the second Tuesday of each month (or an alternate time as agreed upon by the SC), lasting up to 1.5 hours. In preparation for the meeting, SC members are expected to review documents and are expected to make quick decisions in the meeting. If a SC member misses three consecutive meetings without communicating with the MT, they will be asked to step down for the remainder of their term (unless there are extenuating circumstances) but can rejoin at a later date, and a new member(s) is recruited. The Project Coordinator will attend SC meetings but is not a voting member.

The MT is responsible for maintaining a two-way flow of communication between the SC and the research team and ensuring accountability within the SC. This includes answering questions about the SC from persons within the extended research team, receiving private communications on behalf of the SC, and conveying information to the SC that other team members may not be comfortable raising themselves. The Project Coordinator will reach out to persons who have missed meetings and be responsible for the initial intake of new applications.

Working Groups

The bulk of the Project's work on a day-to-day basis is completed by its Working Groups. WGs are created to facilitate the completion of a finite set of tasks related to the work of the project. Some WGs may be relatively short whereas others may run indefinitely.

The determination of whether a WG needs to be formed is decided by the SC, in consultation with the MT. Research team members initiating a WG can propose a membership list to the SC, and consult the committee to determine acceptability, scope, and key goals of a new WG. The MT must also be consulted for administrative approval of the WG (e.g. regarding budget). A temporary Coordinator for the WG is assigned by the SC and that individual then recruits individuals to this new WG from the current research team. If other individuals are required to ensure the work of this new WG is completed, that Coordinator can recruit new persons to the research team. WGs must report back to the SC at monthly intervals with brief reports of the status of their work. Additionally, WGs should promptly bring to the attention of the SC any issues that require the attention of the SC. All members of the Research Team, including members of PPCTS, are eligible to join a WG.

Priority Population Consultation Teams

To ensure that the Project can best address the needs of all nine priority populations, the team consults with a set of nine PPCTs. See the [PPCT Terms of Reference](#) for more detail on these groups. PPCTs are co-facilitated by one to two members of the core research team, who work together to decide on PPCT membership, taking into consideration lived experience, community knowledge, and experience working in policy/research. They are tasked with ensuring that each PPCT has a range of voices at the table, geographically, and intersectionally. PPCTs engage with the project at key intervals, including survey design and knowledge translation. People whose work on a PPCT is outside of the context of their paid employment will be provided with gift card honoraria of \$25 per hour of meeting or prep/discussion time (2-hour cap on prep/discussion time).

Authorship Teams

Authorship teams are composed of team members working on academic papers for the project. The Authorship teams are subject to change based on availability and actual contributions.

Trainees (e.g. Graduate Students, Post-Docs)

Undergraduate and graduate students, and postdoctoral fellows (trainees) under the supervision of a Trans PULSE Canada investigator are eligible to submit data requests for the project. The investigator must guide and supervise all stages of the project, approving all materials before they are submitted to the Project Coordinator. Trainees must first submit a Concept Sheet to their supervisor for approval, and then to the Project Coordinator to circulate for review by the Data Analysis Working Group (DAWG) and SC as outlined in the [Application for](#)

[Data or Analysis](#), Sections B and C. Trainees who are approved to use the data will join the DAWG and will sign a [Data User Agreement](#).

Any presentations, posters, or manuscripts produced by trainees using Trans PULSE Canada data must be reviewed by the supervisor, Community Advisor, and then by the SC. Trainees should allow the SC at least ten working days for review. Trainee projects must be approved by the SC at both the project proposal stage and again before publication or distribution. Note that student theses are not required to undergo a final review by the SC, but any resultant publications in the grey or peer-reviewed literature must be approved.

Trainees who are graduate students are expected to create a Terms of Reference document in conjunction with their supervisors. This document should explicitly outline:

- Proposed authorship and acknowledgement for all components of their project, following our [Authorship and Acknowledgement Policy](#) guidelines.
- A commitment to create specific knowledge translation outputs (e.g., manuscript, community fact sheet) that will benefit the community, following community-based research principles. Also included in the Terms of Reference will be an agreement decreeing that if the trainee does not submit their research product(s) within a reasonable time frame, responsibility for completing the research project and its outputs may be reassigned to other team members to ensure the team's priority research is conducted in a timely manner. In these cases, the trainee may be moved to a secondary author.

Expectations and Accountability

Expectations

Members of working groups on Trans PULSE Canada are expected to:

- Keep up with project communications via email and Basecamp as outlined in our [Communication Policy MOU](#). This involves checking into these platforms at least weekly.
- Acknowledge understanding of tasks and deadlines when assigned. This involves acknowledging whether a task can be completed on time or acknowledging that a task cannot be completed on-time and seeking support to complete that task.
- Understand their own capacity to take on work and recognize when support is needed.
- Checking in if it is, or anticipated to be, a week or more late.
- Maintain confidentiality according to agreements made by WGs.
- Follow all other Project policies: [Accessibility & Equity](#), [Authorship and Acknowledgement](#), [Conflict Resolution](#), [Data Sharing and Security](#), [Language Policy](#), [Mission, Goals, and Guiding Principles](#), [Personal Communications and QuickStats](#), [Policy Changes and Amendments Policy](#), [PPCT Terms of Reference](#), and [Student-Community Advisor Terms of Reference](#).

When additional person-time is needed to complete a task, individuals should confer with team members in smaller groups, or make a call to the larger team seeking support. Where support issues cannot be solved this way, the Project Coordinator should be notified to strategize further. This may involve giving certain tasks to trainees, or the Project Coordinator. Some WGs may have additional expectations for members to adhere to.

Accountability

Trans PULSE Canada is a large team with a binding schedule. As such, if individuals fail to oversee the completion of work, that component of the project will not be completed. For this reason, individual accountability is of the utmost importance.

Members of WGs on Trans PULSE Canada are accountable for overseeing the completion of the work they take on. This may involve completing that work themselves or ensuring that others can complete that work.

Processes for Joining the Research Team

In the early phases of the Project, PPCTs were the gateway to joining WGs and people were invited to join PPCTs by PPCT leaders. Currently, team members, including PPCT members, are invited to join WGs and Authorship Teams either through an open call on Basecamp Headquarters or by invitation. WGs and Authorship Teams are the gateways to joining the SC. Currently, the project is not recruiting new team members. If a person contacts the Project with a membership inquiry, the MT will review the application and assess if there is a need for this person on an Authorship Team or WG.

Membership on the SC is open to all WG members and terms of membership are for periods of 6 and 12 months. The exceptions to the 6- & 12-month membership are the Co-PIs, who will occupy permanent seats on the SC. If there is a vacancy on the SC, a call will be put out to the full team to join the SC. Any member of the Trans PULSE Canada team is eligible, based on need, to respond to the call to join the SC. This includes any person currently participating in a Trans PULSE Canada WG. The decision will be made by the current SC.

Processes for Leaving the Research Team

Voluntarily

Any person who wishes to leave or temporarily step back from the research team should notify one or all members of the MT, as well as the leaders of any WG that they're part of. They should make note of any loose ends on their plate and propose a plan for the completion of those tasks. This includes passing along all work in progress, and information needed to complete this work. If a member of the DAWG wishes to permanently leave the team, the MT will be responsible for confirming that survey data is no longer accessible. Those voluntarily leaving the team will be able to choose whether they would like to remain on Basecamp.

Involuntarily

- a) Ethical and professional misconduct: If a team member engages in ethical or professional misconduct, or there are criminal issues, the team member will be removed or put on leave by the appropriate authority immediately.
- b) If a problem is identified as significant enough to merit someone's removal (e.g., violating the missions and principles of the project) that should be brought to the attention of the SC. The SC will ensure that an appropriate conflict resolution process has been followed first if the situation necessitates it (see [Conflict Resolution Policy MOU](#)). The SC will solicit feedback from the research team, and a team member will be removed from the project by a two-thirds majority vote by the SC. If the team member is a SC member, that member will not be present at this SC meeting. If a problem is identified as significant enough to merit the removal of one of the PIs, this will be brought to the attention of the appropriate authority.