



Research Team Memorandum of Understanding

Team Structure and Decision-Making

Version date: 8 August 2018

These Memorandum of Understanding documents are intended to guide the work of the Trans Youth CAN! 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.

1. Research Team Membership and Project Roles

All research team members and committee members must abide by all other team policies described in all the project MOUs.

The core research team (see table below) includes those who have created the project and are listed on the research grant, or who serve as the central staff for the project. In all MOUs and project policies, references to the "research team" refer to the team outlined in the table below.

<i>Principal Investigators</i>	Greta Bauer (PI), Margaret Lawson (co-PI, CL)
<i>Management Team</i>	Greta Bauer (PI), Sandra Gotovac (PC), Margaret Lawson (co-PI, CL/when relevant)
<i>Team Members (CL= clinic lead)</i>	Joey Bonifacio, Robert Couch (CL), Jen Ducharme (CL), Stephen Feder, Lorraine Gale, Shuvo Ghosh (CL), Lorelee Gillis, Cindy Holmes, Natasha Johnson (CL), Carys Massarella, Dan Metzger (CL), Arati Mokashi (CL), Danièle Pacaud (CL), Mark Palmert, Annie Pullen Sansfaçon, Jake Pyne, Joe Raiche, Elizabeth Saewyc, Kathy Speechley, Robert Stein (CL), Françoise Susset, Julie Temple Newhook, Simon Trepel, John VanderMeulen, Ashley Vandermorris (CL)
<i>Project Coordinator</i>	Sandra Gotovac (PC)

The extended research team includes the core research team and the groups outlined below:

Clinic site team members are those involved in recruitment or data collection at a specific clinic site, and are contributors but not members of the overall research team. They will be included in acknowledgements slides for presentations, and may apply to join the research team if they wish to conduct analyses or author research papers.

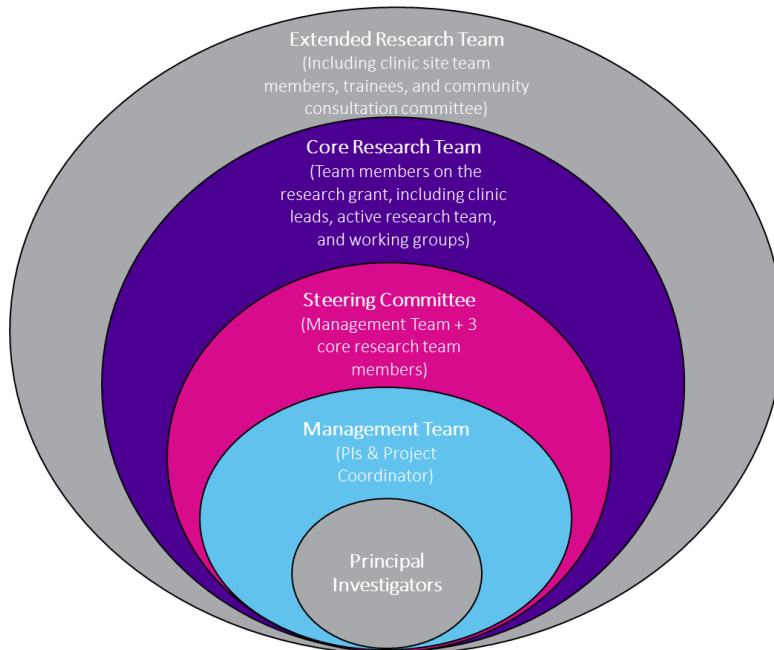
<i>Clinical Site Investigators</i>	Megan Cooney, Jonathan Dawrant, Manpreet Doulla, Chelsey Grimbly, Brandon Hursch, Karine Khatchadourian, David Martin, Sebastien Pangello, Katie Punkdyk, Amy Robinson, Scott Somerville, Katie Soper, Brandy Wicklow,
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Trainees are undergraduate, graduate or medical students; residents; or postdoctoral fellows who are under the direct supervision of a research team member. Trainees are members of the extended research team, but are not part of core research team for decision making.

<i>Trainees</i>	Siobhan Churchill, Emily Nunez, Laura Douglas, Anna Martha Vaitses Fontanari, others TBD
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Community Consultation Committee members are those who work with the project in the interpretation and knowledge translation phase to shape the research outputs for accuracy and community relevance. They will be included in acknowledgements slides for presentations, and may apply to join the research team if they wish to conduct analyses or author research papers.

<i>Community Consultation Committee for KTE</i>	TBD 2019
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2. Committees and Working Groups and Decision Making

Management Team will manage day-to-day operations of the project, including financial aspects of the grant, will coordinate finances across the clinical sites, will coordinate across the clinical sites, and will direct management issues to the steering committee or relevant working group(s). The management team consists of the PI and the PC, with the co-PI being included in management decisions when relevant.

Active Research Team members are those who have participated in a meaningful way to project activities in the last 6 months (through participation in meetings, on basecamp, or through email communication with the management team). When the research team needs to vote on a particular issue, it is the members of the active research team who will participate in the voting. Members of the research team who have not actively participated for a period of 6 months will be notified by the Project Coordinator that they are being moved to the inactive list. All inactive team members will still receive all project notices and updates (either via email or basecamp), but will not be involved in voting. Team members who are inactive can become members of the active research team again by becoming actively engaged in the project again (either through participation in meetings, in basecamp discussions, or through email communication with the management team).

Steering Committee membership (6 members) will consist of the PI and co-PI, Project Coordinator, and 3 other research team members, at least one clinical and one social science academic. The PI, co-PI, and the PC are permanent members of the Steering Committee, with the remaining 3 members participating through 1 year terms. Members will be selected by taking nominations, and then a vote by the core research team. The Steering Committee is responsible for overall direction of the project, any shifts in the direction of the project (in consultation with the rest of the team), taking advantage of new opportunities, addressing reporting requirements, organizing working groups, helping to guide priority and order of publications, and data stewardship and data use (including reviewing concept sheets, decisions on appropriate/inappropriate use of data), and organization of a media point person(s) to establish who speaks for the team on different issues.

Any decisions that involve sensitive or controversial issues, that may have the potential to cause harm to community, or that have a risk of reinforcing stereotypes will be opened to the entire research team for discussion. The research team will have 1 week to provide their contributions to the Steering Committee, and if there are any objections raised by research team members or if consensus or a resolution could not be agreed upon by the Steering Committee, a rapid response working group may need to be formed to further discuss and resolve the issue.

The Steering Committee will drive for consensus on decision-making, but if consensus cannot be reached then consensus minus one (5 out of 6) will guide decision-making.

Agenda and minutes for Steering Committee meetings will be circulated on Basecamp.

Working Groups are established as needed for particular study project tasks, some of which are project-long (e.g. French Language Working Group) and some of which address issues during a particular phase of the project (e.g. Data Collection Instruments Working Group). Members from the core team and the extended team can be in a working group, but only members of the core team will participate in decision making. For decision making, the working group will strive for consensus among those who are present at the meeting. In the event that consensus cannot be reached, decisions will be made with consensus minus one. If working groups are not able to achieve any consensus, they can bring it to the Steering Committee to help with this process.

Feedback Groups are established ad hoc for short-term specific feedback as needed to obtain rapid feedback from trans youth, parents/caregivers, or other groups whose contributions are

needed to shape the study. Feedback Groups are to be established by open call, unless targeted invitation is necessary (e.g. a Policy-maker Feedback Group).

Community Consultation Committee membership will be established when collection of baseline study data is three months from completion. The Community Consultation Committees will be recruited by having an open call for applicants. Membership will be rotating, with membership being a 1 year term with potential for renewal, and members should have a real interest in research, with deep community knowledge. Membership will have a focus on inclusion and representation (including geographic, ethnoracial, gender identity, and age) while avoiding tokenism. Four committees will be formed: a youth group and a parent group, and each of those two groups will have an English group and a French group. The groups can be combined to meet together as needed for relevant consultation (youth and their parent(s) should not be on the same committee, or participate in the same consultation discussion). The community consultation groups will meet about 6 times a year, with each meeting being a maximum of 2 hours. Each of the four groups will be coordinated by a member of the research team, and the coordinators will have administrative support from the project's research staff. Each meeting will have clear goals set out beforehand, and a meeting agenda will be circulated to members before the meeting. Coordinators should ensure they meet with each other and communicate on a somewhat regular basis so that we ensure all consultation committees are operating efficiently.

Team members who are interested in being a coordinator for a consultation group can volunteer, and the coordinators for the 4 groups will be chosen by a vote by the research team. If two team members wish to work together as co-coordinators for a consultation group that is a possibility, and if there are no appropriate volunteers to coordinate any of the consultation committees the Steering Committee will ask team members to volunteer. Coordinators must have facilitation skills, be able to build trust and relationships with community members, and experience in community-engaged research is preferred. Consultations may also occur with other community experts for specific and relevant topics as needed (i.e., consultation with a legal person, a clinical members of the team, or with a policy expert, who may be internal or external to the research team), even if those individuals are not regular members of the Community Consultation Committees. The Community Consultation Committee will be responsible for consultation with the research team on general strategizing for KTE, as well as consultation on specific KTE products and topics. The Committee functions in a consultation capacity, and will not be able to make any unilateral decisions regarding the project, and will not have veto rights over anything the project produces. Research team members are also encouraged to consult with the Community Consultation Committee prior to submitting concept sheets, but team members should reach out to the Management Team first to connect them with the relevant consultation group. The Community Consultation Committee might not consult on all concept sheets (i.e., they likely will not consult on concept sheets focusing on medical or clinical outcomes). All members of the Community Consultation Committee will be asked to sign a confidentiality agreement, and limited sharing of group discussions will be specified in the terms of their membership. All members of the Community Consultation Committee will be compensated with a gift card for their time at \$20/hour for each meeting they participate in (choice of three gift card options: Tim Horton's, Starbucks, iTunes).

3. Meetings and Internal Communication

The Steering Committee will hold monthly video calls with any other Staff and Trainees or team members involved in the issues being discussed at each time-point (1-2 hours, depending on need – workdays or evening). Additional meetings can be scheduled as needed. Steering Committee will invite any other team members who need to discuss particular agenda items to meetings, and meetings will be open to all members of the Research Team to attend, with voting reserved for committee members. The Steering Committee will have a project space on basecamp.

Regular video meetings of the entire research team will occur at 6-month intervals. In-person meetings of the research team will occur in years 1, 3 and 5 in conjunction with the CPATH conference. The team will endeavor to connect team members who are not present through video (preferred) or conference calling. The team will also endeavor to take advantage of other opportunities to meet in-person when multiple team members attend the same event (e.g., Pediatric Endocrinology conference). Team members are also encouraged to take advantage of other opportunities to meet in-person if they find there are events or times in which they are in the same city/area.

Academic, Clinical and Knowledge User Team Members will meet via video as needed at strategic time-points to refine study protocols for consistent recruitment and data collection across the clinics and to strategize regarding any issues that may emerge.

Working Groups will meet via video conference as needed. Each working group will have a project site within basecamp.

Community Consultation Committees will meet as needed. The Community Consultation Committee will have a project space on the basecamp site, where all communication and document sharing will take place.

Evaluation of concept sheets, conflict resolution, and other sensitive discussions should happen on WebEx and not on basecamp. Nothing confidential is to be posted on basecamp. Project documents, basecamp content, email discussions, and WebEx content is not to be shared by any team members outside of basecamp or the research team without Steering Committee Approval.

4. Process for Conflict Prevention and Resolution

Conflict is a normal part of working in groups/teams, and it is expected that at some point during the course of this project members will experience some conflict. We encourage any team members experiencing conflict to address the issue immediately, as conflict avoidance can be detrimental to the project and the team.

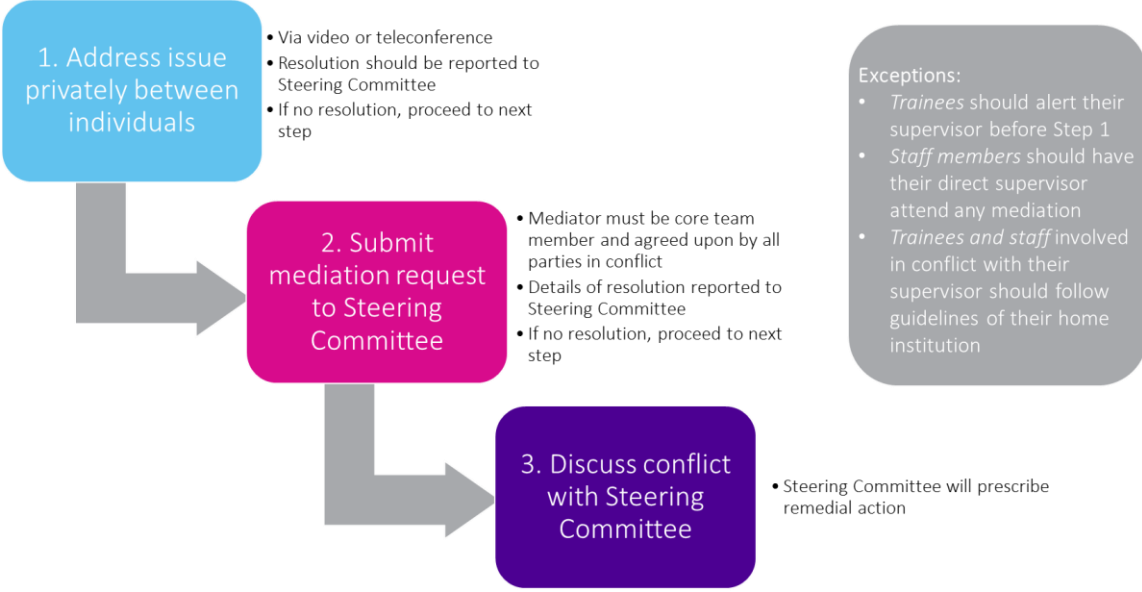
Transparency is a guiding principle of this project (e.g., Steering Committee meetings open to team members, policies are all posted on the website, drafts and other project materials posted for the team on Basecamp). If conflict/tension is apparent, it should be brought up with team members and/or Pls. Misunderstandings need to be addressed. Conflict should not be resolved via e-mail or text, but by telephone or preferably video meeting (or in-person, if in the same location).

The following process has been developed to address any conflicts within the team, and should not be executed via email:

1. Team members in conflict should first address the issue in private via video or teleconference, and communicate about how such conflict might affect the project as well as the community. Details of the resolution should be reported to the Steering Committee via email, videoconference, or teleconference. If a resolution was not reached, team members should proceed to the next step.
2. Team members in conflict must submit a mediation request to the Steering Committee. The mediator must come from within the team, and be agreed upon by all parties in conflict. Conflict mediation should happen in private via video or teleconference. Details of the resolution should be reported to the Steering Committee via email, videoconference, or teleconference. If a resolution was not reached, team members should proceed to the next step.
3. Team members in conflict discuss the disagreement with the Steering Committee, which will then prescribe appropriate remedial action. These consequences must be "timely; reasonable; respectful; a graduated step process; aligned with and connected to the impact on the project, individuals and community."

All team members are expected to follow these guidelines, with the following exceptions:

1. *Trainees* involved in conflict should alert their supervisor prior to taking Step 1.
2. *Staff members* involved in conflict should ensure that their direct supervisor attends any mediation video or teleconferences that take place.
3. *Trainees or staff members* in conflict with their own supervisors should adhere to the guidelines of their home institutions.



5. Process for Joining and Leaving the Research Team:

Joining the Research Team as a Co-Investigator

- a. Each January, the Trans Youth CAN! grant membership will be updated to include new members.
- b. *When research team is approached by an interested party:*
The interested party must submit a statement of interest, and a CV or resume. The statement of interest must include academic and community background or expertise, related experience, and an indication of why they are interested in joining the team, and your background and approach to trans youth and/or gender-affirming care. The Steering Committee will screen the application and request any additional feedback from the interested party if necessary, and will solicit feedback from the whole research team. The Steering Committee will reach a decision based on the individual's academic and community-building potential, and the need for their contributions to the project. To add someone to the team, at least 5 out of 6 members the Steering Committee must vote affirmatively.
- c. *When the research team recruits a new member:*
If the team identifies an area where we need more expertise, the Steering Committee will solicit the team for suggestions of possible co-investigators to add. When the team decides to recruit a new member, the member will submit a statement of interest, and a CV or resume (see process above as stated in (b)).

Joining the Research Team as a Student, Resident, or Trainee (not paid by the Trans Youth CAN! grant)

- a. The student, resident, or trainee needs to be under the direct supervision of a co-investigator team member. A Memorandum of Understanding (MOU) will be drafted between the Trainee and the Research Team outlining the terms of their participation in the project. The MOU will be approved by the Steering Committee (who will solicit feedback from the research team).

Leaving the Research Team

- a. Team members who wish to leave the project will be removed from the grant annually each January.
- b. Team members who wish to leave the team should notify the Steering Committee to work out a transition plan.
- c. 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.
- d. 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 Steering Committee. The Steering Committee will ensure that an appropriate conflict resolution process has been followed first if the situation necessitates it. The Steering Committee will solicit feedback from the research team, and a team member will be removed from the project by a minimum 5 out of 6 vote by the Steering Committee.