

**About this template**

Please use this template as a guide only. The terms of reference should be honoured by all team members. In collaboration with PPI contributors, each research team can develop and adapt the format and content according to needs and context. Use the template as a starting point for each collaboration. There are other templates available (such as [Involve UK](https://www.invo.org.uk/wp-content/uploads/2012/10/Terms-of-reference-template-1-example-3-PPIC.pdf) and [PARADIGM-IMI](https://imi-paradigm.eu/petoolbox/contract-templates/)) which may suit your needs better.



Project Name

**Terms of Reference Agreement Date: 4th September 20XX**

# Purpose (of the collaboration)

What are the goals for the collaboration? Typically 3-5 set goals are sufficient. Think of how the goals will be met and how you will capture this. Agreement on the goals and how to achieve them will clarify expectations. It will also outline how the team will work together to meet the goals.

# Scope of the Project

What does the project want to achieve? What are the specific aims and objectives?

# Who is part of the Project Team (list the names and roles of everyone involved)

**Project Lead:**

**Project researcher(s):**

**Project Advisors and consultants?**

**Project Management Support:**

**Expert(s) by experience**:

**Project Funder(s):**

# Statement on what is expected from team members

Team members will:

* Attend scheduled team meetings.
* Read any information that is shared before the meeting (agree when information is circulated so that everyone has enough time to read it)
* Agree of a format for information that is accessible and understandable for all team members.
* Comment on documents
* Share your ideas and views freely and actively.
* Suggest issues for consideration at meetings.
* In group meetings, be respectful of the responsibilities, viewpoints, and expertise of other members.
* Respect any requests for confidentiality,
* Declare any conflicts of interest if they arise.

# Communication

# Decide on how the team will communicate. How many in-person meetings will be needed? How frequently will the team meet? Will the team use audio- or video conferencing? Will the proposed ways of communicating be accessible to all team members? Is alternative and augmentative communication required?

# Confidentiality

As a team, decide on what information needs to be considered confidential.

*Example:* Some discussions or papers circulated for meetings may be considered as confidential. If unclear, please seek clarification from the project lead. By becoming a collaborator on this project you agree to uphold this confidentiality.

# Time Commitment

Make sure to discuss how much time the work on the project requires from team members. This also means that the team agrees on the time and frequency of meetings, the hours of work between meetings. Be clear of the length of the project overall.

# Remuneration

Discuss on whether team members receive payment for their work on the project. Also ensure that the team knows how to claim back expenses. Be clear about what can and what cannot be claimed.

# Benefit (of membership of the group)

Outline expected benefits from collaboration. This can be useful to have outlined at the start, as it can be used to assess the collaboration downstream- are the intended benefits being met?

# Raising concerns

Make sure that you agree on how team members can raise concerns or issues they do not understand.

*Example:* If there is something about the group or a meeting that makes you feel uncomfortable or concerned, please approach the chairperson (Named Person) or project lead (Named Person). If you are uncomfortable contacting either of these people, (Named Person & contact details) an independent contact not aligned to this project can act as your contact point.

# Conflicts of interest

What conflicts of interest may exist or arise for team members?

As standard for research, all collaborators should be required to disclose any involvement with individuals, government bodies, commercial interests or third parties which could lead to a conflict of interest, or perceived conflict of interest, with the work of the group. A conflict of interest doesn’t stop someone from becoming a collaborator but must be declared. Suggest using the standard institute [policy on conflict of interests](https://hub.ucd.ie/usis/W_HU_MENU.P_DOWNLOAD_FILE?p_filename=Conflict%20of%20Interest%20Policy.pdf&p_parameters=36F8A0AC5B0D6F23FA1EEB8E7C5668E87D47F894CE813A2C5A31FE1A69D113A3E1C278129BDAF0CFDDCE3164583EBA531A5BD75BDA0E66BADD87A83CB8AFE41A).

# Training and Support

Outline if there is scope to provide training and/or support and how to request or access this.

# Definition of Terms

Make sure that the language used in the document is understood by all members of the collaboration.

# Contact person (for queries on the Terms of Reference)

Decide on a contact person. Name the person(s) responsible for answering queries related to the document and the ways to contact them.

# Revision Schedule

Outline the expected date for revision and or review of the terms of reference.