

Equitably Onboarding Community Researchers with Lived Expertise

A Toolkit for Unity Health Research Staff

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We wish to acknowledge the sacred land on which MAP and Unity Health Toronto operate. It has been a site of human activity for 15,000 years. This land is the territory of the Huron-Wendat and Petun First Nations, the Seneca, and most recently, the Mississaugas of the Credit First Nation. The territory was the subject of the Dish With One Spoon Wampum Belt Covenant, an agreement between the Iroquois Confederacy and Confederacy of the Ojibwe and allied nations to peaceably share and care for the resources around the Great Lakes. Today, the meeting place of Toronto is still the home of many Indigenous people from across Turtle Island, and we are grateful to have the opportunity to work in the community, on this territory. We are also mindful of broken covenants and the need to strive to make right with all our relations. We are all Treaty people. Many of us, have come here as settlers, immigrants, newcomers in this generation or generations past. We would like to also acknowledge those of us who came here forcibly, particularly as a result of the Trans-Atlantic Slave trade. Therefore, we honour and pay tribute to the ancestors of African Origin and Descent.

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Glossary

Acronym	Full Name
EDI	Equity, Diversity and Inclusion
ORA	Office of Research Administration (Unity Health)
REB	Research Ethics Board
SPA	Service Provider Agreement
UHT	Unity Health Toronto
CRA	Canada Revenue Agency
Terms	Definition
Community Researcher	In the context of this toolkit, community researchers refer to individuals who work in partnership with Unity Health researchers on topics that they have firsthand experience with and/or on issues whose outcomes directly impact their lives. These individuals are often involved in all stages of the research project. Other terms used UHT include: Community Experts and Patient Partners.
Meaningful engagement	In the context of this toolkit, meaningful engagement happens when community researcher’s involvement in the research is well defined by transparently accounting for an agreed level of involvement in the research activities as well as ensuring alignment with their interest and expertise.
Tokenism	When community researchers are invited to participate in research to check off a box for “community participation,” without any consideration of their interest in the work and without a plan for how they will be meaningfully involved in the research process to achieve shared and agreed upon objectives and priorities.

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Note: As you explore this toolkit, please be aware that some internal links are restricted to Unity Health employees.

1. Introduction

In this section:

- 1.1 About this toolkit
- 1.2 Intended audience
- 1.3 Toolkit overview
- 1.4 How to use this toolkit

1.1 About this toolkit

Welcome! This tool kit is a practical guide for Unity Health Researchers. It provides guidance on how to onboard **community members with lived experience and expertise** that have been hired to collaborate on health/social sciences research. These individuals work in partnership with Unity Health researchers on topics that they have firsthand expertise in, and/or on issues whose outcomes affect their lives and the lives of those living in the broader community.

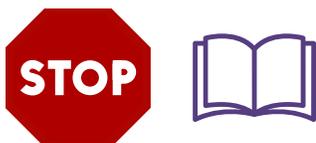
This toolkit was developed by the Unity Health research community in response to the need for clear direction among Unity Health research teams on best practices to onboard community researchers with lived experience/expertise into new research projects or teams. Community researchers working with Unity Health research staff have identified that the initial onboarding process lays the foundation for **meaningful** engagement throughout the research journey.

Therefore, to ensure that research on health equity truly reflects the experiences, expertise, and needs of community members, it is crucial for Unity Health researchers to prioritize effective onboarding of community researchers from an equity, diversity, and inclusion (EDI anti-racism) lens.

1.2 Intended audience

This toolkit is aimed at Unity Health research staff, graduate students, post-doctoral fellows, and principal investigators who...

- Are thinking of collaborating with community researchers with lived experience in future research endeavours,
OR
- Are already collaborating with community researchers with lived experience and would like to improve their onboarding processes and team function for new community researchers who join their work,
AND
- Are either planning or currently engaged in collaborations with community researchers with lived experience.



Before reading this toolkit, you should carefully review this [Resource Guide on Patient and Community Engagement in Research](#), which was developed by the [Patient and Community Engagement in Research Committee \(PCERC\)](#) at Unity Health Toronto. This toolkit assumes that **you have reviewed the hyperlinked resource guide** or are highly comfortable with principles and frameworks of **meaningfully** engaging community members in research.

*Please note that the [Resource Guide on Patient and Community Engagement in Research](#) provides valuable resources for Unity Health researchers with little, intermediate, and high levels of understanding/experience in community engagement.

We recommend reviewing this Resource Guide even if your team is highly knowledgeable about community engagement.

Note: This toolkit offers a general guide and resources to support onboarding activities, including compensation agreements and capacity building. It is designed to help orient community researchers to research teams and includes a compilation of existing UHT compensation policies.

This toolkit is not tailored to any specific community. Different communities have their own norms on how they want to be engaged and respected in research, we encourage teams to be mindful of these differences and to invest time and resources in building meaningful relationships and incorporate community specific steps in their recruitment, onboarding, and compensation process.

1.3 Toolkit overview

This toolkit outlines the onboarding process for community researchers **after** they have been recruited to collaborate with Unity Health. *If you are curious about best practices to recruit and hire community researchers, please refer to Unity Health toolkit on Equitable Hiring as well as [Resource Guide on Patient and Community Engagement in Research](#).

The toolkit is divided into **two main sections: first: an equitable and low barrier onboarding process and a discussion on individual's** current skills and an agreed future development plan.

- **2.1-2.5** How to **orient** new community researchers (i.e., introduce and integrate) community researchers into the Unity Health research project/team that they have been hired to collaborate with. This section will illustrate the ideal first few weeks for a community researcher at Unity Health.
- **3.1-3.5** How to **train** (i.e., build research literacy and skills of) community researchers so they can carry out the research tasks to their fullest capacity.

Please see the [\[Table of Contents\]](#) for a more detailed list of the topics within these sections.

1.4 How to use this toolkit

This toolkit is intended to be a **self-directed** learning resource for the Unity Health research community. We recommend that Unity Health research teams return to this toolkit on a regular basis as they progress through the different stages of preparing to onboard community researchers.

Best practices for onboarding community researchers are constantly evolving as Unity Health evolves as a research institution and learns more about collaborating with community members who have lived expertise. Therefore, this toolkit is intended to be a **living document**, subject to updates as necessary, for Unity Health research teams to refer to.

If there is anything in this toolkit that you notice needs updating (e.g., broken links, changes to Unity Health policies, etc.), please contact mapceg@unityhealth.to.

Here are some notes about language used in this toolkit:

- You will notice throughout this toolkit, we use the term **community researchers** to refer to individuals who work in partnership with Unity Health researchers on topics that they have firsthand experience with and/or on issues whose outcomes directly impact their lives. Note that this differs from community engagement practices where institutions may engage communities on specific issue (e.g. entire neighbourhood) and co-create solutions.
- For simplicity, we will continue to use the term **community researcher**. However, we are cognizant that teams within the Unity Health research community use other terms to refer to community researchers, such as *patient/community partners*, *participatory research partners*, *peer researchers*, and more. We recommend having a conversation with community researchers about what title they prefer to describe their role.
- We use the term **Unity Health researchers/research staff** throughout this toolkit to refer to current employees of Unity Health. Please note there are UHT employees who are community researchers with lived expertise.

Keep an eye out for these icons to help you navigate this toolkit:



Indicates recommended/required readings and resources.



Indicates a checklist of best practices or steps to follow.



Indicates an interactive tool for your team to use.

2. Orienting Community Researchers

In this section:

2.1 Orientation: A series of essential conversations

- 2.1a Onboarding multiple community researchers
- 2.1b Agreeing upon shared values

2.2 The community researcher's role and expectations

2.3 Supporting community researchers through an EDI lens

- 2.3a Roadmap to arranging compensation

2.1 Orientation: A series of essential conversations

When a community researcher first joins a research team, it is important to make them feel welcome and supported while providing essential information about the research work and their role and involvement with the team.

In this section, we outline the **essential onboarding conversations** that Unity Health researchers should have with community researchers during the first few weeks in their role, as well as steps on how Unity Health research teams should prepare for these conversations. For specific topics to discuss refer to the community researcher's role and expectations in [section 2.2](#).

Please ensure that you provide community researchers with a list of topics you will cover during these onboarding conversations beforehand, as having access to a list will allow community researchers to prepare as needed (e.g., thinking of questions or support needs to communicate with the rest of the team).

It is expected that Unity Health research teams will **revisit** these conversations with community researchers, such as instances where...

- The community researcher needs clarification.
 - Example: A community researcher may like to have a 1-on-1 conversation to check their understanding of the study design after you have introduced the project to them.
- Changes have occurred since your initial conversation.
 - Example: Since first introducing the study to a community researcher, the expected timeline for research tasks has shifted.
- The community researcher's needs have changed.
 - Example: A community researcher may want to have a 1-on-1 conversation to discuss potential changes to the project activities, communication, etc.
- The team is conducting a new project.

2.1a Onboarding multiple community members

Some of these conversations may be conducted 1-on-1, while others may be more beneficial as group discussions if the team is onboarding multiple community researchers at once.

- Strengths of 1-on-1 discussions: Allows for in-depth discussions, rapport/trust-building with individual research team members, and answering questions the community researcher may not feel comfortable asking in a group setting.
- Strengths of group discussions: Allows for rapport/trust-building across Unity Health researchers and the community researchers, more efficient dissemination of information, and group-learning. It is advised that group discussions with the research team occur once community researchers have established relationships with select research staff and feel comfortable engaging with the entire team.

If onboarding multiple community researchers to a team, it is also important to provide community researchers with the opportunity to get to know each other during the onboarding process without Unity Health research staff present so they can establish rapport and trust amongst themselves.

2.1b Agreeing upon shared values and expectations

Many research teams that collaborate with community researchers create shared agreements that outline the terms of their partnership. The process of creating this shared agreement involves many of the conversation topics that are covered throughout **Section 2**, such as responsibilities, commitments and accommodations.

At Unity Health, different research teams may use different language to refer to these shared agreements, such as *terms of reference*, *handbook*, or *memorandum of understanding*.

In addition, these agreements often define the team's shared values and goals, which can help lay the foundation for trust and meaningful partnerships. Creating this shared agreement should build on conversations during recruitment and may involve open conversations about: power dynamics, research currency (what is traditionally valued in research) accountability, and managing group dynamics. These conversations are necessary for unlearning and beginning to change the current ideology of what is considered valuable and worthwhile in research.



[Research 101: A Manifesto for Ethical Research in the Downtown Eastside](#) offers useful examples of what a shared agreement may include from the perspective of community researchers.

These shared agreements serve as a helpful resource for both Unity Health and community to refer back to throughout the research project with all the information covered during the onboarding process.

- Please ensure that the agreement is reviewed by any community researchers that are onboarded after the initial development of agreements to ensure they have the opportunity to provide feedback and make any needed amendments.

Consider if community researchers on the team experience challenges with written documents, and how best to meet their needs so they can access this resource.

For instance, consider recording videos of shared agreements for team members to return to on a private video channel.

These shared agreements are likely to **evolve with lessons learned throughout the research process**. Consider how often the research team will revisit the shared agreement to review what should be sustained and what needs to be updated (e.g., once a year).

UHT Accessibility Services Resources:

Unity Health Toronto General Accessibility Policy available on the intranet here:

<https://policies.unityhealth.to/doc.aspx?id=3505>

Interpreter Services:

<https://unitynet.unity.local/departments-programs-services/clinical/interpreter-services/>



2.2 The community researcher's role and expectations

The checklist below provides Unity Health staff with a series of questions to assess whether you are ready to have the following conversations with community researchers about the details of their role and expectations. For each item, there is a brief explanation of why it is important to have these conversations during the onboarding process.

The **'Not yet, what should I do?'** column explains what steps you should take if you are not prepared to have a certain conversation. Once you feel that your team is prepared to have one of the conversations listed below, use the checkbox in the **'Yes'** column to check it off the list.

Note that along with having conversations about each of these topics with the community researcher, it is also important to provide community researchers with a copy of the information to refer back to as needed (e.g., written document, recorded video on a private video channel).

#	I agree that...	Yes/ No	Not yet, what should I do?	Why is this conversation needed?
Role and expectations				
1	I can convey to the community researcher how valuable their lived expertise is to my Unity Health research team and the broader landscape of health equity-focused research and advocacy.	<input type="checkbox"/>	See the Resource Guide on Patient and Community Engagement in Research, Level 1: Learn for readings on the strengths of community researchers and the value of their contributions.	The first step of establishing a sense of respect, mutual understanding, and collaboration between community researchers and academics. Helps to mitigate unequal power dynamics that may exist.
2	I can introduce Unity Health as a health network, its three main hospitals, and the organizational structure of its research institutes.	<input type="checkbox"/>	See the About Unity Health webpages: 1 , 2 .	Provides context and clarity about how community researchers contribute to Unity Health as an organization.
3	I can explain how my research team fits into Unity Health’s organizational structure.	<input type="checkbox"/>	Consider creating a simple flowchart of which department your team belongs to, and which hospital the department belongs to.	Provides context and clarity about how community researchers contribute to your research team and Unity Health as an organization.
4	I can introduce my research team, including its: <ul style="list-style-type: none"> • Purpose & values / team culture • Research team members • Current activities 	<input type="checkbox"/>	Find existing material used to introduce new members to your team (e.g., an existing section on your team’s website about the team).” Consider how you can facilitate personable introductions to the team members (e.g., live rounds of introductions during a team meeting, individual coffee chats).	Provides context for the team’s motivations, why they are engaging in health equity-focused research, and is the first step in building rapport between the community researcher and your team.
5	I have provided a list of acronyms or terms that commonly get used by members of my research team.	<input type="checkbox"/>	Find or create a list of common acronyms used by the research team and at UHT. See example of common acronyms at UHT by PCERC in Appendix A .	Allows for community researchers to follow along in conversations where these acronyms are used. Note that it is recommended to avoid using jargon or acronyms whenever possible!
6	I can introduce the research project the community researcher will be working on, including: <ul style="list-style-type: none"> • Objectives • Design • Methods • Timeline • Outputs 	<input type="checkbox"/>	See [3.1-3.3] for resources to introduce the research project’s components in plain language to community researchers if they have little to no prior experience in a formal research setting.	Community researchers must have an understanding of the work they are part of in order to participate to the fullest of their capacity.

#	I agree that...	Yes/ No	Not yet, what should I do?	Why is this conversation needed?
Role and expectations				
7	<p>I can clearly outline the community researcher's tasks and responsibilities and details about:</p> <ul style="list-style-type: none"> • What to expect to occur during research tasks • The expected time commitment for research tasks, UHT compensation structure, timing and method of payment options, and any other supports the research team is able to offer i.e. transportation costs, caregiving support etc. • The overall expected time commitment for a community researcher 	<input type="checkbox"/>	<p>Refer to materials your team used to recruit and hire community researchers that explained the tasks and time commitment of their role (i.e., job posting, promotional materials for positions).</p> <p>Section 2.3 of this toolkit discusses considerations for initiating conversations with community researchers to ensure that clear expectations are continually set regarding roles, responsibilities, and compensation</p>	<p>Community researchers must have an understanding of the work they are part of in order to participate to the fullest of their capacity. An understanding of what might ensue during a research task and what time that research tasks will take allows community researchers to plan accordingly.</p>
8	<p>I can provide the community researchers with communication channels for how to contact and stay informed about their work progress, commitment, goals and the research team's progress. I have established means for community researchers to update their contact information if needed.</p>	<input type="checkbox"/>	<p>Consider assigning a primary contact within your research team for the community researchers. Additionally, consider if community researchers have intermittent access to e-communication channels. In such cases, it is essential to ensure communication channels also include non-electronic means.</p>	<p>Clear communication channels builds trust and rapport between community researchers and research team, as well as facilitates the revisiting of any of the conversations in this checklist as needed (e.g. community research role and title, opportunity for growth, etc.).</p>
9	<p>I have a plan how I will manage power dynamics and cultivate a meaningful space for bi-directional communication and feedback.</p>	<input type="checkbox"/>	<p>See the Resource Guide on Patient and Community Engagement in Research, Level 2: Apply for readings and guidance on understanding power sharing.</p>	<p>Having a discussion and acknowledging existing power dynamics helps establish clear guidelines for shared decision-making and ways to address power imbalances. When these conversations are avoided, community researchers may experience marginalization and become fearful of losing the opportunity if they disagree with set processes.</p>

#	I agree that...	Yes/ No	Not yet, what should I do?	Why is this conversation needed?
Role and expectations				
10	I can provide emotional support to community researchers.	<input type="checkbox"/>	Facilitate emotional check-ins with community researchers through 1-on-1 meetings and among peers within the team. Offer to share existing resources and offer to connect the individual to community counselling services. Resource: Mindful Awareness Stabilization Training (MAST) program Resource	Community researchers conduct research in areas where they have firsthand expert experience with and/or the outcomes of which affects their lives and the lives of those living in the broader community. As such, their role may involve significant emotional labour for which it is essential to provide structured emotional support. Note: Emotional wellness should be prioritized for everyone involved in research including research staff. Wellness resources can be accessed through Unity Health Toronto's Workplace Health Safety and Wellness department. More information is available here
11	I can explain the offboarding process if the community member exits their role.	<input type="checkbox"/>	Along with settling payments and retrieving loaned items, consider implementing an exit interview to gather final feedback about the community researcher's experience. Think about how to maintain a positive relationship in the future, such as offering to provide letters of reference or future opportunities for collaboration (as applicable).	Establishing expectations for the exit process helps community researchers to be offboarded gracefully and smoothly.



2.3 Supporting community researchers through an EDI lens

During orientation, Unity Health research teams should initiate ongoing conversations that ensure clear expectations are **continually set** about:

- How to meet the needs of community researchers,
- How to gauge and respond to any changing needs of community researchers,
- How shifting personal circumstances may alter community researchers' scope of work.
- How community researchers like to be supported with personal development goals and interests within a research environment.

The checklist below highlights support needs that Unity Health research teams should consider for in-person and remote community researchers.

While reviewing this checklist, remember that:

- Individuals require varied support to show up in their roles, and different community researchers may have distinct needs.
- Some community researchers might not feel comfortable sharing information about their support needs right away.
 - As noted by community researchers who contributed to this toolkit, an initial hesitance to share their support needs may stem from negative experiences having disclosed their support needs to other institutions, yet not receiving the needed support.
 - However, Unity Health researchers can build trust over time by (1) starting conversations about support needs **early, proactively and on a routine basis**, and (2) **following through** on requests for support and accommodations in a timely manner.

In-person	Remote	All community researchers
<ul style="list-style-type: none"> ✓ Provide transportation support, such as covering public transit fares or taxis/ Ubers. ✓ Provide food and refreshments, especially if meetings are held during mealtimes. ✓ Consider if community researchers need to arrange caregiving. Examples of support that can be provided to a community researcher include covering the cost of childcare, allowing for virtual/asynchronous participation, or arranging for child-friendly meeting spaces. Think about the scope of childcare support the research team is able to provide and communicate this with the community researcher. ✓ Hold meetings & other on-site research activities in locations that community members find physically accessible. 	<ul style="list-style-type: none"> ✓ Ask whether the community researcher has reliable device, Internet, webcam, and mic access. Discuss expectations for keeping webcams/mics on. ✓ Build digital literacy skills into the onboarding process, such as providing support to navigate different and/or new platforms and devices. ✓ Be mindful of the timing of research activities and potential conflicts during conventional 9-5 working hours. Conflicts can occur for many different reasons, such as the timing of childcare drop-off/pick-ups, social service hours, for community researchers in a different time zone, and more. Think about whether the research team has the flexibility to accommodate research activities outside the conventional working day. ✓ If handling confidential data, consider whether a private working environment is accessible to the community researcher or if alternate arrangements are needed. 	<ul style="list-style-type: none"> ✓ Conduct research in the first language spoken by your community researchers or provide translation/interpretation services. ✓ Inquire about accessibility needs and ensure the communication format and support meet the Accessibility for Ontarians with Disabilities Act (AODA) standards. General tip: Minimize jargon in written communication and aim for a reading level of Grade 7-9. ✓ When possible, provide support to navigate health and social systems, such as direct assistance in scheduling appointments and advocating to ensure they receive timely and appropriate care through leveraging existing community partnership within the sector. ✓ Arrange a fair compensation strategy [See 2.3a].



2.3a Compensation roadmap

Step 1

Learn what makes a compensation strategy fair for a community researcher.

Goal: Understand how to design a compensation strategy that accounts for the impacts of financial insecurity on community researchers.

Step 2

Learn how the Unity Health Research Employment, Research Contracts, and Research Finance departments compensate community researchers.

Goal: Be able to clarify to community researchers what their compensation options are and the pros and cons of each option.

Step 3

Co-select a suitable compensation arrangement and revisit as needed.

Goal: Set up structured processes to regularly review and evaluate compensation arrangement with community researchers.

Step 1

Learn what makes a compensation strategy fair for a community researcher. After completing this step, your research team should understand how to design a compensation strategy that accounts for the impacts of financial insecurity on community researchers.

- Financial insecurity can present a barrier to community researchers' ability to engage in research activities.
- A key part of valuing the contributions and expertise of community researchers is providing an appropriate wage for their work. See CIHR's [patient partner compensation guidelines](#) and [considerations when paying patient partners in research](#) for approaches and concrete examples of how to fairly compensate various types of research involvement.
- It is essential to account for the cost of living and inflation when budgeting, making wage increases where necessary, especially given that hours can be unpredictable for community researchers. Resource: <https://research.unityhealth.to/resources/pcer/resource-guide#h2-2>
- Social assistance programs often contain claw-back policies that penalize recipients who earn additional income through employment. These policies mean that people may lose a portion of their benefit entitlement when their earned income exceeds a specified monthly threshold. As such, these income claw-backs can significantly harm people experiencing financial instability, sometimes leaving them even more financially insecure than if they had not sought employment at all.
- The readings listed below offer detailed explanations of punitive claw-back and earning exemption policies within the Ontario Disability Support Program (ODSP) and Ontario Works (OW). UHT staff collaborating with research partners who receive income assistance other than ODSP and OW should still review these readings, as they provide a foundation for understanding how various social assistance programs can impact the participation of community researchers.

Additional Resources

- [MAP Centre for Urban Health Solutions. \(2024\). How research organizations can effectively work with individuals receiving social assistance in Ontario: addressing barriers to employment and compensation. Toronto: St. Michael's Hospital, Unity Health Toronto.](#)
- [The Dream Team. \(2011\). What stops us from working? New ways to make work pay, by fixing the treatment of earnings under the Ontario Disability Support Program. Toronto: Centre for Addiction and Mental Health.](#)
- [Working and earning on the Ontario Disability Support Program. Government of Ontario.](#)
- [Working and earning while on Ontario Works. Government of Ontario.](#)



Step 2

Learn how Unity Health's Research Employment, Research Contracts, and Research Finance departments compensate community researchers. After completing this step, your research team should be able to clarify to community researchers what their compensation options are, and the pros and cons of each compensation option.

- Review the following chart in [Appendix B](#) outlining the different compensation options at Unity Health. Use the information in this chart to help community researchers determine:
 - Which compensation option is most suitable for them,
 - How they would like their payments to be timed (e.g., lump sums or installments),
 - What form of payment they would like to receive (e.g., gift cards, direct deposit, Interac e-transfers, cheques, cash).
- The chart in [Appendix B](#) was created to address the limitations of a "one-size-fits-all" approach to compensation. For example, deciding for a community researcher that they will receive monthly gift cards may not suit their circumstances and preferences. Instead, offer a range of options to ensure flexibility and appropriateness for each individual.

Step 3

Co-select a suitable compensation arrangement and revisit as needed.

Important Considerations

- Following a discussion and consent with community researchers on social assistance, your team should monitor their progress towards reaching the maximum compensation thresholds before claw-backs occur and notify the community researchers as needed, allowing them to negotiate and modify the form or timing of their payments.
- Implement annual increases to community researchers compensation similar to hired staff.

3. Training Community Researchers

In this section:

3.1 What to consider: Training delivery

3.2 Training resource library

- 3.2a Introduction to research
- 3.2b Qualitative methods
- 3.2c Quantitative methods



3.1 What to consider: Training delivery

Research skills training for community researchers should be accessible, relevant, and engaging. This checklist is designed to guide you through key factors to consider when planning and delivering research skills training. For each item, there is a brief explanation of why it is important to think through before delivering research skills training. These conversations should be approached with sensitivity and should demonstrate support.

#	Question	Yes	Why is this important?
1	What is the scope of the community researcher's activities?	<input type="checkbox"/>	Training should be relevant to the community researcher's tasks.
2	What is the bandwidth of your research team and the community researchers to deliver and absorb training (e.g., hours committed and compensation for completing training)?	<input type="checkbox"/>	Completing training can be time-consuming and labour-intensive, so it is important to compensate community researchers for training hours like other research tasks. Depending on the scope of activities, training may require many hours, so anticipate how this factors into the overall research timeline.
3	What are the community researcher's learning goals? What is their learning style? What resources would facilitate their learning process?	<input type="checkbox"/>	Along with equipping community researchers to complete research tasks, training should enable the community researcher to achieve the fullest extent of collaboration they desire and have the capacity for.
4	What modes of learning will be used? Are they hands-on, individual, group-based? Are they interactive? Are they accessible?	<input type="checkbox"/>	Different styles of learning have different benefits; group learning sessions can enable knowledge sharing and increase team bonding, whereas 1-on-1 training sessions can allow for more intensive support. Community researchers have commented on how training requirements like the TCPS-2 Ethics Course can be dense, inaccessible, and full of jargon, which is why it is important to deliver training that is engaging and meets different accessibility needs.
5	Can the community researchers receive certification for completing this training?	<input type="checkbox"/>	Receiving certification allows for community researchers to boost their professional resume/ portfolio.



3.2 Training resource library

This training resource library is designed to support community researchers at every stage, whether they are completely new to conducting research or learning more about specific methods. The library includes both external resources that we have reviewed (e.g., for use of plain language vs. academic jargon), as well as internal training resources developed by Unity Health teams.

Table [3.2a](#) contains core trainings on the fundamentals of research, tailored for community researchers who have little or no prior experience in conducting research. Table 3.2b and 3.2c are add-on resource libraries. Table [3.2b](#) focuses on qualitative research methods, while Table [3.2c](#) focuses on quantitative research methods.

Feel free to use, adapt, and draw inspiration from the resources in this library to fit the needs of the research project and community researcher(s).

3.2a Introduction to research

#	Topic	Resource
Introduction to research		
1	What is research?	<p>Research Fundamentals: Preparing You to Successfully Contribute to Research</p> <ul style="list-style-type: none"> • Self-paced online modules by Patient-Centered Outcomes Research Institute (PCORI) • See Module titled ‘Engaging in Stakeholder-Driven Research’ • Ideal for clinical research • Resource is from the United States; make note of different terms (e.g., IRB vs. REB) <p>Everyone can do Research: A Plain Language Guide on How to do Research</p> <ul style="list-style-type: none"> • PDF manual by Access Alliance • See Chapter 1: Introduction to Research, pages 8-12 • Ideal for community research
2	The research lifecycle	<p>Research Fundamentals: Preparing You to Successfully Contribute to Research</p> <ul style="list-style-type: none"> • Self-paced online modules by Patient-Centered Outcomes Research Institute (PCORI) • See Modules 1-5 • Ideal for clinical research • Resource is from the United States; make note of different terms (e.g., IRB vs. REB) <p>Everyone can do Research: A Plain Language Guide on How to do Research</p> <ul style="list-style-type: none"> • PDF manual by Access Alliance • See Chapter 1: Introduction to Research, page 15 • Ideal for community research <p>TIER Research Resource Portal</p> <ul style="list-style-type: none"> • Web portal by The Institute for Education Research: University Health Network • See webpage ‘The Publication Cycle’

#	Topic	Resource
Introduction to research		
3	Overview of research methods	<p>Research Fundamentals: Preparing You to Successfully Contribute to Research</p> <ul style="list-style-type: none"> • Self-paced online modules by Patient-Centered Outcomes Research Institute (PCORI) • See Modules 1-5 • Ideal for clinical research • Resource is from the United States; make note of different terms (e.g., IRB vs. REB) <p>Everyone can do Research: A Plain Language Guide on How to do Research</p> <ul style="list-style-type: none"> • PDF manual by Access Alliance • See Chapter 1: Introduction to Research, page 15 • Ideal for community research <p>TIER Research Resource Portal</p> <ul style="list-style-type: none"> • Web portal by The Institute for Education Research: University Health Network • See webpage ‘The Publication Cycle’ <p>Drug Policy Training Modules</p> <ul style="list-style-type: none"> • Self-paced online modules by the Ontario Drug Policy Research Network • Introductory resource that is specifically targeted to newcomers to Ontario drug policy research • Certificate upon completion of all 6 modules
4	Research ethics	<p>Research Fundamentals: Preparing You to Successfully Contribute to Research</p> <ul style="list-style-type: none"> • Self-paced online modules by Patient-Centered Outcomes Research Institute (PCORI) • See Modules 1-5 • Ideal for clinical research • Resource is from the United States; make note of different terms (e.g., IRB vs. REB) <p>Everyone can do Research: A Plain Language Guide on How to do Research</p> <ul style="list-style-type: none"> • PDF manual by Access Alliance • See Chapter 1: Introduction to Research, page 15 • Ideal for community research <p>TIER Research Resource Portal</p> <ul style="list-style-type: none"> • Web portal by The Institute for Education Research: University Health Network • See webpage ‘The Publication Cycle’

#	Topic	Resource
Introduction to research		
5	Literature searching	<p>Research Fundamentals: Preparing You to Successfully Contribute to Research</p> <ul style="list-style-type: none"> • Self-paced online modules by Patient-Centered Outcomes Research Institute (PCORI) • See Modules 1-5 • Ideal for clinical research • Resource is from the United States; make note of different terms (e.g., IRB vs. REB) <p>Everyone can do Research: A Plain Language Guide on How to do Research</p> <ul style="list-style-type: none"> • PDF manual by Access Alliance • See Chapter 1: Introduction to Research, page 15 • Ideal for community research <p>TIER Research Resource Portal</p> <ul style="list-style-type: none"> • Web portal by The Institute for Education Research: University Health Network • See webpage ‘The Publication Cycle’ <p>St. Michael’s Hospital Library Service - On-Demand Workshops</p> <ul style="list-style-type: none"> • Library also offers custom workshops that can be taught in-person or via Zoom at a time and place convenient for your group of 5 or more learners. • Recommend workshop for community researchers: Practical Approaches to Information Seeking <p>Practical Approaches to Information Seeking</p> <ul style="list-style-type: none"> • PowerPoint by Carolyn Ziegler (St. Michael’s Health Sciences Library) • Slides cover how to formulate a searchable question, using Google Scholar and PubMed, locating grey literature, and evaluating websites • Contact carolyn.ziegler@unityhealth.to for slides
6	Outputs	<p>Everyone can do Research: A Plain Language Guide on How to do Research</p> <ul style="list-style-type: none"> • PDF manual by Access Alliance • See Chapter 6: How to Share Your Results and Make Positive Change, pages 68-74 • Ideal for community research

3.2b Qualitative methods

#	Topic	Resource
Qualitative methods		
1	What is qualitative research?	<p>Everyone can do Research: A Plain Language Guide on How to do Research</p> <ul style="list-style-type: none"> • PDF manual by Access Alliance • See pages 20-21 • Ideal for community research <p>Qualitative Research For Beginners What Is Qualitative Data?</p> <ul style="list-style-type: none"> • YouTube video by Dr. Hayley Stainton • See 0:00-4:10 (what is qualitative research, advantages and disadvantages) <p>Qualitative research methodology Qualitative Research Methods an Overview</p> <ul style="list-style-type: none"> • YouTube video by Dr. Dee • Less than 2 minutes, easy to follow example
2	The qualitative research lifecycle	<p>What Is Qualitative Research? Methods & Examples</p> <ul style="list-style-type: none"> • Brief article by Scribbr • Provides a high-level overview of qualitative research steps (along with other introductory information)
3	Qualitative study designs	<p>What Is Qualitative Research? Methods & Examples</p> <ul style="list-style-type: none"> • Brief article by Scribbr • Provides a high-level overview of different types of qualitative methods (along with other introductory information)
4	What makes a good qualitative research question/objective?	<p>Everyone can do Research: A Plain Language Guide on How to do Research</p> <ul style="list-style-type: none"> • PDF manual by Access Alliance • See Chapter 2: How to Design Your Research, pages 27-33 • Ideal for community research

#	Topic	Resource
Qualitative methods		
5	Reading and understanding qualitative research	<p>Reading a Qualitative Research Article</p> <ul style="list-style-type: none"> • YouTube video by Dr. Andy Johnson • Goes over the main sections of qualitative research articles and what to look for in each <p>On Your Mark, Get Set, Go: A Step-by-Step Guide to Reading and Using Qualitative Research</p> <ul style="list-style-type: none"> • Blog post by Victoria Povilaitis, PhD • Good use of plain language and conversational writing voice, targeted to non-academics
6	Sampling and recruitment	<p>Everyone can do Research: A Plain Language Guide on How to do Research</p> <ul style="list-style-type: none"> • PDF manual by Access Alliance • See Chapter 1: Introduction to Research, page 21 • Page 34-36 • Ideal for community research
7	Data collection	<p>Everyone can do Research: A Plain Language Guide on How to do Research</p> <ul style="list-style-type: none"> • PDF manual by Access Alliance • See Chapter 2: How to Design Your Research, pages 33-40 • See Chapter 4: How to Collect Data, pages 48-56 • Ideal for community research <p>Qualitative Research For Beginners What Is Qualitative Data?</p> <ul style="list-style-type: none"> • YouTube video by Dr. Hayley Stainton • See 4:10-12:27 (how to conduct interviews and focus groups) • More academic tone <p>Semi-Structured Interviews Guide Semi-Structured Interview Protocol</p> <ul style="list-style-type: none"> • YouTube video by Dr. Dee • Broad overview of the interview process <p>Qualitative Interview Moderating Phrase Toolkit</p> <ul style="list-style-type: none"> • Blog article by Catherine Chan • Lists common situations during interviews and focus group and phrases to use to navigate them
8	Data analysis	<p>Everyone can do Research: A Plain Language Guide on How to do Research</p> <ul style="list-style-type: none"> • PDF manual by Access Alliance • See Chapter 5: How to Analyze Your Data, pages 56-68 • Ideal for community research <p>How to Analyse Qualitative Data for an Interview Semi-Structured Interview</p> <ul style="list-style-type: none"> • YouTube video by Dr. Dee • Broad overview of the transcription and coding process

3.2c Quantitative methods

#	Topic	Resource
Quantitative methods		
1	What is quantitative research?	<p>Research Fundamentals: Preparing You to Successfully Contribute to Research</p> <ul style="list-style-type: none"> • Self-paced online modules by Patient-Centered Outcomes Research Institute (PCORI) • See Module titled ‘Engaging in Stakeholder-Driven Research’ • Ideal for clinical research • Resource is from the United States; make note of different terms (e.g., IRB vs. REB) <p>Everyone can do Research: A Plain Language Guide on How to do Research</p> <ul style="list-style-type: none"> • PDF manual by Access Alliance • See Chapter 1: Introduction to Research, pages 17-20 • Ideal for community research
2	The quantitative research lifecycle	<p>Research Fundamentals: Preparing You to Successfully Contribute to Research</p> <ul style="list-style-type: none"> • Self-paced online modules by Patient-Centered Outcomes Research Institute (PCORI) • See Modules 1-5 • Ideal for clinical research • Resource is from the United States; make note of different terms (e.g., IRB vs. REB) <p>Everyone can do Research: A Plain Language Guide on How to do Research</p> <ul style="list-style-type: none"> • PDF manual by Access Alliance • See Chapter 1: Introduction to Research, page 15 • Ideal for community research <p>TIER Research Resource Portal</p> <ul style="list-style-type: none"> • Web portal by The Institute for Education Research: University Health Network • See webpage ‘The Publication Cycle’
3	Overview of quantitative study designs	<p>Types of Study Design</p> <ul style="list-style-type: none"> • Article by Geeky Medics • Describes different types of epidemiological study designs • Concise writing, but missing images/diagrams that could supplement these explanations
4	What makes a good quantitative research question?	<p>Developing Your Research Questions</p> <ul style="list-style-type: none"> • Short PDF by Nova Southeastern University • Contains a very brief section on guidelines for developing quantitative research questions <p>How to Structure Quantitative Research Questions</p> <ul style="list-style-type: none"> • Webpage by Laerd Dissertation • Uses plain language to explain the components and structure of well-written quantitative research questions

#	Topic	Resource
Quantitative methods		
5	Quantitative research ethics	Ethical Considerations in Research Types & Examples <ul style="list-style-type: none"> • Brief article by Scribbr • Includes examples relevant to surveys
6	Reading and understanding quantitative research	Statistics Fundamentals <ul style="list-style-type: none"> • YouTube playlist by StatQuest with Josh Starmer • Explains basic statistics concepts and what they mean in plain language and concise videos Basic Quantitative Toolkit <ul style="list-style-type: none"> • Repository of resources curated by Spark: A Centre for Social Research Innovation (McMaster University) • Multiple introductory resources on understanding and interpreting statistics and quantitative research • Selected resources may be dense and/or academic in tone
7	Sampling and recruitment	Types of Sampling Methods (4.1) <ul style="list-style-type: none"> • YouTube video by Simple Learning Pro • Covers: biased samples, convenience samples, voluntary response samples, unbiased samples, and sampling methods such as stratified random sampling, multistage sampling, and simple random sampling Explaining Randomization in Clinical Trials <ul style="list-style-type: none"> • YouTube video by U.S. Department of Health and Human Services • Explains randomization and double-blinding • Targeted to potential research study participants, but good use of plain language to explain these concepts

#	Topic	Resource
Quantitative methods		
8	Data collection	<p>Writing Good Survey Questions – Statistics Help</p> <ul style="list-style-type: none"> • YouTube video by Dr. Nic’s Math and Stats • Concise, plain language, clear examples <p>Sampling Methods and Bias with Surveys: Crash Course Statistics #10</p> <ul style="list-style-type: none"> • YouTube video by CrashCourse • Engaging and conversational • Discusses how to identify good and bad survey questions <p>Survey Question Sequence, Flow, and Style</p> <ul style="list-style-type: none"> • Blog post by Qualtrics • Short article that explains how ordering of questions, length, etc. can affect survey results
9	Data analysis	<p>Statistics Fundamentals</p> <ul style="list-style-type: none"> • YouTube playlist by StatQuest with Josh Starmer • Explains basic statistics concepts and what they mean in plain language and concise videos <p>Everyone can do Research: A Plain Language Guide on How to do Research</p> <ul style="list-style-type: none"> • PDF manual by Access Alliance • See page 66 for simple quantitative analysis exercises • Ideal for community research <p>Basic Quantitative Toolkit</p> <ul style="list-style-type: none"> • Repository of resources curated by Spark: A Centre for Social Research Innovation (McMaster University) • Multiple introductory resources on understanding and interpreting data analyses • Selected resources may be dense and/or academic in tone <p>Charts Are Like Pasta - Data Visualization Part 1: Crash Course Statistics #5</p> <ul style="list-style-type: none"> • YouTube video by CrashCourse • Part 1 of a 2-part series that explains charts used to visualize categorical and quantitative data, as well as when these charts should be used <p>Plots, Outliers, and Justin Timberlake: Data Visualization Part 2: Crash Course Statistics #6</p> <ul style="list-style-type: none"> • YouTube video by CrashCourse • Part 2 of a 2-part series that explains charts used to visualize quantitative data & what outliers are

Appendix A. Commonly Used Acronyms

Acronym	Full Name/Definition
CARESA	Council of Anti Racism, Equity, and Social Accountability
CIHR	Canadian Institutes for Health Research
EDI	Equity, Diversity and Inclusion
KRCBS or KRC	Keenan Research Centre for Biomedical Science
LKSKI or LKS	Li Ka Shing Knowledge Institute
ORA	Office of Research Administration (Unity Health)
PI	Principal Investigator (Lead Scientist on a research study)
REB	Research Ethics Board
SMH	St. Michael's Hospital
SPA	Service Provider Agreement
UHT	Unity Health Toronto

Appendix B. Compensation Roadmap

Direct				
Strategy	Payment setup	Benefits	Risks	Other notes
<p>1. Honoraria: Gift cards, cash, e-transfer, cheques or electronic fund transfers provided directly to the individual. To be used when working with community researchers through informal engagement when the total cost of the services provided by the community researcher over the lifetime of those services amounts to <\$7500.</p> <p>If you're not sure whether a Service Provider Agreement is needed, please complete the SPA Checklist and follow steps outlined on the Research Finance page.</p>	<p>Petty Cash Float: Used for honoraria that require cash payment upon completing involvement with a study or committee. Can be provided via cash, Interac e-transfer, cheques, or gift cards.</p> <p>Request for Payment via Direct Deposit: Used if the payee would like funds to be deposited directly into their bank account. Note that the direct deposit form is not a reimbursement form; the payee receives their compensation from Accounts Payable and can take up to 45 business days.</p>	<p>Providing payees directly with gift cards or payment methods using Petty Cash Float account such as cash decreases the processing time for payments done through Research Finance / Accounts Payable, which can be up to 45 business days. Additionally, the income that participants earned will not be automatically reported to the Canada Revenue Agency (CRA).</p> <p>Note the payment amount must be under \$500. See next column for risks.</p>	<p>Direct deposit/ cheques of >\$500 paid through research finance/ accounts payable are automatically reported to the CRA.</p> <p>Community researchers paid through petty cash float and gift card are responsible to report payments >\$500 to the CRA if paid through this options.</p> <p>However, if community researchers prefer, they can request the research team to work with Accounts Payable/Payroll teams to have a T4A issued.</p>	<p>It is recommended that community researchers sign a Memorandum of Understanding (MOU) that outlines the scope and duration of the service. Note that this MOU is not a formal institutional contract co-create with CRs.</p> <p>For petty cash floats, there is a per-payment transaction limit of \$450. The PI must be willing to set up and be liable for the float. Interac e-transfers can only be made via petty cash floats, as Accounts Payable does not accommodate Interac e-transfers.</p> <p>Direct deposit is always facilitated via Accounts Payable. For direct deposit, the payee's banking information and a signature from the community researcher are required.</p> <p>Questions about honoraria should be directed to researchfinance@unityhealth.to.</p>

Strategy	Payment setup	Benefits	Risks	Other notes
<p>2. Service provider agreement: Formal institutional contract between Unity Health and the community researcher which outlines exactly what services they are providing and what compensation they will receive. To be used when the total cost of the services provided by the community researcher over the lifetime of those services amounts to >\$7500. If you're not sure whether a Service Provider Agreement is needed, please complete the SPA Checklist and follow steps outlined on the Research Finance page.</p>	<p>Submit a service provider agreement review application, as well as a project approval for service provider agreements form to the appropriate Research Finance Analyst (RFA). Request for Payment via Direct Deposit or cheque: Used if the payee would like funds to be deposited directly into their bank account. Note that the direct deposit form is not a reimbursement form; the payee receives their compensation from Accounts Payable.</p>	<p>Some community researchers prefer having a formal institutional contract, especially those who approach their work as consultants. Community researchers can choose when they invoice for payment, thus giving flexibility in managing their finances</p>	<p>If community researcher is paid through service provider agreement via direct deposit or cheque, then the income is automatically reported to the CRA. This may subject the payee to social assistance claw-backs.</p>	<p>Questions about Service Provider Agreements should be directed to researchcontracts@unityhealth.to.</p> <p>Direct deposit and cheques is always facilitated via Accounts Payable. For direct deposit, the payee's banking information and a signature from the community researcher are required.</p>

Indirect				
Strategy	Payment setup	Benefits	Risks	Other notes
<p>1. <u>Engaging through an External Organization as a Research Visitor:</u></p> <p>Visiting employees from an external institution or organization (e.g., community outreach workers working for a community agency) who are part of an active collaboration with a Unity Health Researcher.</p>	<p>Do not receive compensation from Unity Health.</p> <p>Follow the steps outlined in this package on Getting Started for Research Volunteers/Visitors.</p> <p>Visitors are issued a letter that says they are affiliated with an external organization and that the external organization takes responsibility for their conduct.</p> <p>The external organization administers payment. However, if the Unity Health research team involved in the collaboration has a subgrant agreement with the external organization, the Unity Health research team can send the external organization grant funds to pay the community researcher. Contact researchcontracts@unityhealth.to about setting up a subgrant agreement.</p>	<p>No income tax slips are issued from Unity Health.</p> <p>Unity Health badge and email access are granted.</p>	<p>N/A.</p>	<p>This compensation strategy will not be applicable for all community researchers, as it requires an external affiliation.</p> <p>Questions about research visitors should be directed to researchemployment@unityhealth.to.</p>

Strategy	Payment setup	Benefits	Risks	Other notes
<p>2. Research volunteers: Apply to a Unity Health supervisor to volunteer their time for a hospital-based research project or program.</p>	<p>Do not receive compensation from Unity Health.</p> <p>Follow the steps outlined in this package on Getting Started for Research Volunteers/Visitors.</p>	<p>No income tax slips are issued from Unity Health. Unity Health badge and email access are granted.</p>	<p>N/A.</p>	<p>Volunteers cannot be paid monetarily. Consider if selecting this option is most appropriate for the nature of the collaboration with the community research, given CIHR's patient partner compensation guidelines.</p> <p>Research team are encouraged to explore compensation options for community researchers.</p> <p>Questions about research volunteers should be directed to researchemployment@unityhealth.to.</p>