

**Operational Guidelines for**  
Study Team Workforce Development Workgroup (aka, The Working Group)  
Version 1

**Purpose of the Working Group**

Vision	Incorporate stakeholder perspectives into the development of MICHHR's Education and Mentoring Group (EMG) study team education and training through information collection and dialogue with representatives of stakeholder groups.
Mission	The EMG Working Group represents the broader health research community that EMG serves, and exists to leverage the collective knowledge of the offices and individuals in this space to inform its development and delivery of education and training. The Working Group will provide MICHHR with stakeholder perspectives and feedback and serve as a forum for identifying and assessing new ideas, piloting new products, and conducting due diligence regarding planning and implementation of education and training offerings.
Strategic Objectives	<p>Objectives of the EMG Working Group include:</p> <ul style="list-style-type: none"> <li>• Assess the current health research landscape at U-M and identify training and education gaps and opportunities.</li> <li>• Provide feedback on current EMG education and training initiatives and methods.</li> <li>• Assess feasibility and stakeholder receptiveness of new education and training offerings</li> <li>• Identify operational barriers and challenges to implementation and delivery of education and training offerings including opportunities for better equity and inclusion.</li> <li>• Identify the professional development needs of health research team members</li> </ul>
Limitations of Scope	<p>The Working Group will:</p> <ul style="list-style-type: none"> <li>• Meet the charge presented in the Vision, Mission, and Strategic Objectives.</li> <li>• Work to fully execute the scopes of work presented to it by EMG, drawing on their expertise, networks, and access to information.</li> </ul> <p>Within these parameters, EMG plans for the work and experience to be meaningful and rewarding.</p> <p>The Working Group will NOT:</p> <ul style="list-style-type: none"> <li>• Serve in any governance, advisory, or oversight capacity. The group will be asked to deliver recommendations, provide feedback, and produce data/results, and all materials will be taken into consideration by EMG in its ongoing planning and creative work.</li> <li>• Be authorized or asked to create any EMG policy, direct any planning, or decide any strategies for EMG. EMG and its leadership will retain all decision making capacity and authority over any initiatives resulting from the Working Group.</li> </ul>

### Relevant Definitions

Clinical and Health Research	Throughout this document we will refer to clinical and health research. By this we mean human subjects research focused on health or clinical outcomes including clinical trials, observational research, retrospective reviews, social/behavioral research and pilot or feasibility studies.
Study Team	A study team is an inclusive unit referring to all people who contribute to the success of a research project regardless of role. The study team may include faculty, staff, students, volunteers, patients and community members.
Research Support Offices	Offices at U-M that have as part of their mission to directly support health and clinical human subjects research. These offices may also support non-research or other types of research activities so long as there is at least one role in the office that is dedicated to human subjects clinical or health research support. Umbrella units such as the Clinical Trial Support Units are included if they maintain support staff outside of the study teams and if they cross departments. MICHR is excluded from this definition as it applies to this document.
Training and Education	Training and education includes trainings as well as educational materials (ex. training handouts, job aids, templates, etc.). For purposes of this document, training and education are limited to competency-based initiatives for clinical and health research professionals.
Competency-Based	Competencies are specific measurable behaviors, skills or knowledge that are expected for a specific role or area of study. At MICHR, we aim to create training and education that directly connects to one or more competencies required for a clinical or health professional as part of a study team.

### Membership Details

Eligibility Criteria	<p>9-15 study team or research support office members will be chosen by a selection committee from MICHR. Members of the Working Group should:</p> <ul style="list-style-type: none"> <li>• represent either clinical and health research study teams or research support offices.</li> <li>• support competency-based approaches to education and training with the goal of contributing to the sustainability of a well-trained clinical and health research workforce.</li> <li>• Obtain approval from a supervisor/ PI to serve on the working group.</li> <li>• Not be currently receiving salary support from MICHR; former MICHR employees and non-salaried affiliates are eligible.</li> </ul>
Representation	<p>We are seeking representatives from the following three groups:</p> <ol style="list-style-type: none"> <li>1. Michigan Medicine: Study team members who are hired through departments in Michigan Medicine. This should include a mix of departments and a mix of research types. While a mix of roles is ideal, <b>preference will be given for study coordinators, project managers or early career faculty.</b></li> <li>2. Other University Research Departments: Study team members who are hired through departments external to Michigan Medicine. This should include a mix of departments and a mix of research types. While a mix of roles is ideal, <b>preference will be given for study coordinators, project managers or early career faculty.</b></li> <li>3. Research Support Offices (see definition in section E): Members who have a full time role in a research support office. This should include <b>a mix of offices in Michigan Medicine and across the Ann Arbor campus.</b></li> </ol>
Role Expectations	<p>Members of the Working Group will be expected to participate in two 1.5 hour meetings per year. Additional sub-committee meetings and electronic communication will be used between meetings as needed. To be considered in good standing, members are expected to:</p> <ul style="list-style-type: none"> <li>• Read and agree to the Working Group Operational Guidelines.</li> <li>• Share knowledge and experience as a member of a research study team or research support office.</li> <li>• Attend both full group meetings each year. If a conflict arises, notify the MICHR Working Group coordinator of your absence, in advance if possible.</li> <li>• Actively participate in additional working group tasks (beyond the two full-group meetings) which may involve e-mail, additional sub-group meetings, and/or independent work.</li> </ul>
Term of Service	<p>Each member shall serve:</p> <ul style="list-style-type: none"> <li>• a one-year term with the ability to apply for a second non-guaranteed year.</li> </ul> <p>After their term(s), members will be considered Working Group members-at-large and, on occasion, be contacted about their willingness to serve on specific projects. They will not be expected to attend the bi-annual meetings or work on additional long-term tasks.</p>
Compensation	<p>There will be no monetary compensation provided to working group participants. Benefits will include</p> <ul style="list-style-type: none"> <li>• having a voice in the area of study team training and education</li> <li>• a professional development opportunity.</li> <li>• Making a Difference awards or letters to be added to personnel folders will be provided to committee members for outstanding participation as determined by the EMG staff coordinator(s).</li> </ul>

### Working Group Structure

Meetings	Meeting agendas will be determined by EMG. Working Group members may suggest topics for meetings by contacting the EMG staff member(s) who are serving in the Working Group coordinator(s) role, but are not guaranteed to be included. Materials and logistics will be sent out in advance of meetings and minutes will be shared with the full working group within two weeks after each biannual meeting.
Subcommittees	<p>Tasks for the group will vary in complexity and length; members will be asked to work on at least one task per term, but many terms will include more than one task. Certain tasks may require additional effort so subcommittees will be formed as needed. Subcommittees will be dissolved when their portion of the task is complete. Additional subcommittee members may also be brought in on a temporary basis as their experience or knowledge warrants. Working Group members will be expected to work on their part of the task, while maintaining their overall role as part of the Working Group.</p> <p>Members who volunteer for subcommittees will be expected to contribute additional effort toward the current task. Subcommittee members will agree to remain on the committee until their specified project is completed. If a specified project extends beyond a subcommittee members term for the Working Group, they will be asked to continue their service to the subcommittee until the task is completed but will be transitioned to members-at-large. Members will be able to transition between subcommittees upon completion of the work in their original subcommittee. If a member informs EMG that they will not be able to continue on a subcommittee, EMG reserves the right to fill that spot in the subcommittee at any time.</p>
Project Proposals	Each task for the Working Group and subcommittees will be communicated by EMG through written proposals, including a defined scope of work, objectives and goals, a timeline of milestones, a schedule of deliverables, and a management plan.
Evaluation	Each person who leaves the Working Group will be given an exit interview in the form of a questionnaire with several open-ended questions.