

Research/Evaluation Roles and Responsibilities Mapping Template

When planning research, including evaluation, it's critical that roles and responsibilities are made clear to all partners involved. This tool is useful for clarifying the roles and responsibilities between a research/academic partner and an implementing organization, and also between various actors within an organization who may be involved in research. To use this tool, modify the relevant tasks (rows) and actors (column headings) as needed. Then, write in the appropriate roles in the relevant cells. Example roles you may ascribe to those involved include: Lead/Decider, Accountable, and Contributor/Reviewer.

Relevant Phase	Relevant Tasks	Academic/Research Partner	Program/Project Team	Other (e.g., Evaluation/ Research Unit)	Other (e.g., Sr. Leader)
Research/ Evaluation Design and Proposal Development	Develop research/evaluation questions				
	Develop evidence syntheses				
	Conduct research/evaluation design workshops				
	Design project/intervention				
	Develop research/evaluation workplan; align with project workplan				
	Determine ethical review process				
	Define data sharing protocol in line with federal requirements				
	Develop proposal				
Research/ Evaluation Start-Up	Develop partnership agreements				
	Obtain Institutional Review Board (IRB) approval				
	Discuss responsibilities and expectations with research partner, implementing team and other actors				
	Decide on research/evaluation management structure				

Relevant Phase	Relevant Tasks	Academic/Research Partner	Program/Project Team	Other (e.g., Evaluation/ Research Unit)	Other (e.g., Sr. Leader)
	Organize and facilitate regular communication				
	Orient project/intervention staff to research/evaluation				
	Develop dissemination plan				
	Recruit research/evaluation staff				
	Train research/evaluation staff				
	Hire data collection firm, if relevant				
	Procure data collection equipment and materials				
	Set up data collection and management systems				
Research/ Evaluation Implementation	Implement and monitor project/intervention				
	Collect and verify data				
	De-identify information in accordance with data sharing protocol				
	Analyze and interpret data				
Close-Out and Results Dissemination	Write outputs (articles, briefs)				
	Hold results validation workshop				
	Disseminate results				
Learning Review	Hold a learning review meeting				

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