

Patient-Oriented Research TSP Rubric

This rubric is designed to help reviewers participating in the review process to assess the rigor and quality of a proposed MSSU Trainee Support Program Application. Reviewers should use this rubric in combination with their own experience and judgment when assessing applications.



Question 1: Does the proposed research approach align with the principles and best practices of POR? (60 points)

Outstanding (17-20 points)	Excellent (13-16 points)	Very Good (9-12 points)	Fair (5-8 points)	Poor (0-4 points)	Score /20
1a. The research project is aligned with the priorities of the provincial health system and responsive to the needs of patients or community. (20 points)					
<p>The research proposal is clearly articulated at the level of Excellent with these additional features:¹</p> <ul style="list-style-type: none"> <input type="checkbox"/> Applicant provides a nuanced description of their relationship to their research, including how their personal experiences relate to the social and structural locations they inhabit and the impact of these on their methodology. <input type="checkbox"/> The applicant provides a nuanced and detailed explanation of how current health inequities (i.e. avoidable and unjust inequalities in health between and within groups of people) exist in relation to their area of study. 	<p>The research proposal is very well-described and feasible:</p> <ul style="list-style-type: none"> <input type="checkbox"/> How the proposed research aligns with the priorities of the province's health system. <input type="checkbox"/> How the project and anticipated outcomes would address an important health need for the patient/public/ community partners (including local organizations). <input type="checkbox"/> How the applicant has established connections or collaborations with PLEs or community organizations. Examples (e.g., volunteer work, leadership, writing, workshops) show authentic engagement with PLEs. <input type="checkbox"/> The applicant's relationship to the research. <p>Certain improvements are possible.</p>	<p>Some elements of the proposal are described well, and others reasonably addressed:</p> <ul style="list-style-type: none"> <input type="checkbox"/> How the proposed research aligns with the priorities of the province's health system. <input type="checkbox"/> How the project and anticipated outcomes would address an important health need for the patient/public/ community partners (including local organizations). <input type="checkbox"/> How the applicant has established connections or collaborations with PLEs or community organizations. Examples (e.g., volunteer work, leadership, writing, workshops) show authentic engagement with PLEs. <input type="checkbox"/> The applicant's relationship to the research. <p>May not be feasible and/or feasibility may be difficult to judge. Some improvements are needed.</p>	<p>The proposal broadly describes some elements but lacks detail. Difficult to judge feasibility.</p>	<p>Elements of the proposal are missing or unclear.</p>	
Outstanding (17-20 points)	Excellent (13-16 points)	Very Good (9-12 points)	Fair (5-8 points)	Poor (0-4 points)	Score /20
1b. People with Lived and Living Experience are active partners in the research. (20 points)					
<p>PE plan is clearly articulated at the level of Excellent with these additional features:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Members of the team define together guiding principles and values for meaningful partnership (ie. Terms of Reference or Charters). <input type="checkbox"/> People with lived experience can choose when and how they are 	<p>PE plan is very well-described and feasible:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Reasons for engaging PLEs in this project. <input type="checkbox"/> Who will be engaged and how they will be recruited. <input type="checkbox"/> When and how PLEs will be engaged (ie. meetings, discussion groups, etc). <input type="checkbox"/> PLEs are engaged in project to the extent that is feasible for the project 	<p>Some elements of the PE plan described well, and others reasonably addressed:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Reasons for engaging PLEs in this project. <input type="checkbox"/> Who will be engaged and how they will be recruited. <input type="checkbox"/> When and how PLEs will be engaged (ie. meetings, discussion groups, etc). 	<p>PE plan broadly describes some elements but lacks detail. Difficult to judge feasibility.</p> <p>This would be the score regardless of inclusion/exclusion of appreciation.</p>	<p>Elements of the PE plan are missing or unclear.</p> <p>This would be the score regardless of inclusion/exclusion of appreciation.</p>	

¹ See Shimmin, C., & Roche, P. (2021). *Readiness to Engage Workbook: Questions for Research Teams & Partners to Consider when Planning and Evaluating Patient and Public Engagement*. The George & Fay Yee Centre for Healthcare Innovation. <https://umanitoba.ca/centre-for-healthcare-innovation/sites/centre-for-healthcare-innovation/files/2021-11/readiness-to-engage-workbook.pdf>

engaged and at what level for each stage of the research project. <input type="checkbox"/> PLEs are engaged in decisions around appreciation and reimbursement of expenses. <input type="checkbox"/> A plan to evaluate PE is described. <input type="checkbox"/> The PE plan demonstrates creativity and/or considers contextual factors.	and within the context of a graduate program and this is well described. <input type="checkbox"/> PE appreciation is well described. Certain improvements are possible.	<input type="checkbox"/> The level of engagement that is possible for the project is clear. <input type="checkbox"/> PE appreciation is included. May not be feasible and/or feasibility may be difficult to judge. Some improvements are needed.			
Outstanding (17-20 points)	Excellent (13-16 points)	Very Good (9-12 points)	Fair (5-8 points)	Poor (0-4 points)	Score /20
1c. Knowledge is generated that can be used to improve patient outcomes, healthcare systems, and/or practices. (20 points)					
KT plan is clearly articulated at the level of Excellent with these additional features: <input type="checkbox"/> Members of the team, including audience or end users, define together the key messages, goals, and strategies. <input type="checkbox"/> KT strategies are creative, evidence-informed, and/or consider contextual factors. <input type="checkbox"/> A plan for robust evaluation of KT strategy is included.	The KT plan is very well-described and feasible: <input type="checkbox"/> Who will benefit from the project (audience or end users) and how they will be engaged. <input type="checkbox"/> Key messages that will result from the research and how they are important for each audience. <input type="checkbox"/> The goals for each audience (generate awareness, interest, buy-in, knowledge sharing, informing decision-making, informing research, facilitating policy change). <input type="checkbox"/> Steps activities, and timelines for knowledge dissemination. <input type="checkbox"/> There is excellent alignment between KT goals, audience and strategies. Certain improvements are possible.	Some elements of the PE plan described well, and others reasonably addressed: <input type="checkbox"/> Who will benefit from the project (audience or end users) and how they will be engaged. <input type="checkbox"/> Key messages that will result from the research and how they are important for each audience. <input type="checkbox"/> The goals for each audience (generate awareness, interest, buy-in, knowledge sharing, informing decision-making, informing research, facilitating policy change). <input type="checkbox"/> Steps activities, and timelines for knowledge dissemination. <input type="checkbox"/> There is good alignment between KT goals, audience and strategies. May not be feasible and/or feasibility may be difficult to judge. Some improvements are needed.	<input type="checkbox"/> PE plan broadly describes some elements but lacks detail. Difficult to judge feasibility.	<input type="checkbox"/> Key elements of the KT plan (e.g., goals, audiences, strategies) are missing and unclear.	

Question 2: Does the proposal clearly describe the project objectives and methods? (35 points)

Outstanding (29-35 points)	Excellent (22-28 points)	Very Good (15-21 points)	Fair (8-14 points)	Poor (0-7 points)	Score /35
The application excels in most or all relevant aspects. Any shortcomings are minimal. <input type="checkbox"/> Research question(s) are exceptionally clear and original, positioned to make a significant contribution <input type="checkbox"/> Study design is correctly outlined (e.g., qualitative description, cohort study, cross-sectional study), is appropriate for the research question, and fully aligned with project aims	The application excels in many relevant aspects and reasonably addresses others. Certain improvements are possible. <input type="checkbox"/> Research question(s) are well-defined, innovative, and firmly rooted in prior evidence or theory <input type="checkbox"/> Study design is robust, aligns tightly with objectives, and uses best practices <input type="checkbox"/> Data collection and analysis plans are clear and justified	The application excels in some relevant aspects and reasonably addresses others. Some improvements are needed. <input type="checkbox"/> Research question(s) and objectives are clearly stated and relevant to topic & health priorities <input type="checkbox"/> Study design is appropriate and mostly well-justified, though minor details may be missing <input type="checkbox"/> Feasibility and timeline are reasonable, though some aspects may not be fully addressed	The application broadly addresses relevant aspects. Major revisions are needed. <input type="checkbox"/> Research objectives are stated but are broad, overlapping, or loosely tied to background rationale <input type="checkbox"/> Study design is mentioned but not fully described or lacks justification <input type="checkbox"/> Feasibility is uncertain; timeline or resources appear unrealistic or incomplete	The application fails to provide convincing information and / or has serious inherent flaws or gaps <input type="checkbox"/> Research question(s) or objectives are unclear, missing, or not aligned with the problem statement <input type="checkbox"/> Study design is inappropriate, absent, or not connected to research aims <input type="checkbox"/> Methodological details are missing or too vague to assess <input type="checkbox"/> No evidence of feasibility, timeline, or resource planning	

<input type="checkbox"/> Details regarding sample selection, intervention, and controls (if applicable), data collection, and data analysis are provided. Data collection tools are appropriate and/or validated (when possible) <input type="checkbox"/> Statistical or analytic methods are specified for the data type; sample size calculations, potential limitations, confounders, or biases are identified with mitigation strategies described (when applicable) <input type="checkbox"/> Feasibility is exceptional, with a well-structured plan, realistic timeline, and strong collaborative support	<input type="checkbox"/> Feasibility is well supported by a logical timeline, team expertise, and access to resources, as appropriate				
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3. Are Sex and Gender considerations well understood and described? (5 points – mean of 3a, 3b, and 3c scores)

Outstanding (5 points)	Excellent (4 points)	Very Good (3 points)	Fair (2 points)	Poor (0-1 points)	Score /5
3a. Applicant shows an understanding of sex/gender considerations and the relevance to the proposed research.					
<input type="checkbox"/> Applicant shows an understanding that sex is a biological attribute, and that gender is a social construct. <input type="checkbox"/> Applicant provides a nuanced explanation of how the biological attribute of sex and/or the social construct of gender overlap and relate to their research, or a thorough and convincing explanation of why sex/gender are not relevant. For a score of 5, this information is integrated into the proposal itself. <input type="checkbox"/> If relevant, the applicant clearly explains how sex/gender will be accounted for in study methods and/or analyses within the proposal.	<input type="checkbox"/> Applicant shows an understanding that sex is a biological attribute, and that gender is a social construct. <input type="checkbox"/> Applicant provides a Very Good explanation of why sex/gender are relevant OR not relevant to the current research. <input type="checkbox"/> If relevant, the applicant provides some detail for how sex/gender will be accounted for in the study methods or analyses.	<input type="checkbox"/> Applicant shows an understanding that sex is a biological attribute, and that gender is a social construct. <input type="checkbox"/> Sex/gender are noted as either relevant or not relevant to the research, without clear explanation or rationale. <input type="checkbox"/> If sex/gender are noted as relevant, no further details are provided for how sex/gender will be accounted for in the study methods or analyses.	Applicant shows an understanding that sex is a biological attribute, and that gender is a social construct, but does not discuss the relevance (or irrelevance) of sex/gender to the proposed research.	Applicant fails to demonstrate an understanding that sex is a biological attribute, and gender is a social construct AND that biological and sociocultural factors have a mutual influence on the experience and expression of sex/gender. Applicant fails to mention whether sex/gender is relevant to the proposed research.	
Outstanding (5 points)	Excellent (4 points)	Very Good (3 points)	Fair (2 points)	Poor (0-1 points)	Score /5
3b. Applicant shows an understanding of sexual orientation considerations.					
<input type="checkbox"/> Applicant provides a nuanced explanation of how sexual orientation relates to their research, or a thorough and convincing explanation of why it is not relevant. For a score of 5, this information is integrated into the proposal itself. <input type="checkbox"/> If relevant, the applicant clearly explains how sexual orientation will be accounted for in study methods and/or analyses within the proposal.	<input type="checkbox"/> Applicant provides a Very Good explanation of why sexual orientation is relevant OR not relevant to the current research. <input type="checkbox"/> If relevant, the applicant provides some detail for how sexual orientation will be accounted for in the study methods or analyses.	<input type="checkbox"/> Sexual orientation is noted as either relevant or not relevant to the research, without clear explanation or rationale. <input type="checkbox"/> If sexual orientation is noted as relevant, no further details are provided for how sexual orientation will be accounted for in the study methods or analyses.	<input type="checkbox"/> Applicant shows an understanding that sexual orientation is an individual difference variable but does not discuss its relevance (or irrelevance) to the proposed research.	Applicant fails to mention whether sexual orientation is relevant to the proposed research.	

Outstanding (5 points)	Excellent (4 points)	Very Good (3 points)	Fair (2 points)	Poor (0-1 points)	Score /5
3c. Eligibility and Inclusion/Exclusion Criteria are clearly described.					
<input type="checkbox"/> Sample characteristics or inclusion/exclusion criteria with respect to sex, gender, and sexual orientation are clearly described demonstrating an understanding of the distinction between these concepts. <input type="checkbox"/> Applicant provides a thorough and nuanced rationale for study inclusion/exclusion criteria with respect to sex, gender, and sexual orientation. For a score of 5, this information is integrated into the proposal itself.	<input type="checkbox"/> Sample characteristics or inclusion/exclusion criteria with respect to sex, gender, and sexual orientation are described demonstrating an understanding of the distinction between these concepts. <input type="checkbox"/> Applicant provides some rationale for their inclusion/exclusion criteria with respect to sex, gender, and sexual orientation.	<input type="checkbox"/> Sample characteristics or inclusion/exclusion criteria with respect to sex, gender, and sexual orientation are mentioned and applicant shows some understanding of the distinction between these concepts. <input type="checkbox"/> However, no clear rationale is provided for their inclusion/exclusion criteria with respect to sex, gender, and sexual orientation.	Sample characteristics or inclusion/exclusion criteria with respect to sex, gender, and sexual orientation are mentioned, but sex and gender are conflated (e.g., men are assumed to have penises or male biological attributes).	No mention of sample characteristics (if archival) or inclusion criteria (if proposing new data collection) with respect to sex, gender, or sexual orientation.	