

## Researcher Planning Checklist

Activity	Date initiated	Date approved	Who approved?
Plan and approvals:			
Project proposal (short)			
Review of project guidelines for researchers: policies and procedures			
Research and data partner engagement plan			
Demonstrated plan to engagement Indigenous Peoples and research plan according to TCPS chapter 9, OCAP, CARE			
EDIA plan			
Knowledge sharing plan			
Full protocol completed			
DMP and PIA/risk assessment completed			
Respondent information letter and consent form			
Respondent recruitment plan			
Draft partner MOU/data sharing agreement if needed			
Submission to REB			
Data processing:			
Executed partner data sharing agreement/MOU			
Secure data transfer/collection plan			
Documentation of data elements, formats for collection; data inventory			
Preparation for analysis – curation and de-identification			
Data access controls for approved persons			

Data Analysis			
Knowledge outputs			
Ensure output is anonymous, where applicable			
Engage with communities as described in protocol			
Ensure publication outputs align with periodical/editorial guidelines			
Meta-data and archive			
Meta-data and documentation approved by CERC personnel			
Data archived according to predefined research plan and best practice			
IP assessment – open or restricted, according to protocol and research agreements			
Re-use			
Approvals for data re-use, as defined in protocol			
Types of data and data elements approved through research or partner agreement			
Conditions for re-use approved			
Project close-out protocols (data anonymization, destruction, data inventory)			

