CONJOINT HEALTH RESEARCH ETHICS BOARD (CHREB)
Research Services Office
2500 University Drive NW, Calgary, AB, T2N1N4
Telephone: (403) 220-7990
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Recruiting Participants for Research

The recruitment process is often the first point of contact between researchers and potential participants. It is an essential step in ensuring voluntariness and informed consent (TCPS2, Article 3.1).

Researchers must consider factors that may unduly influence participation decisions and take steps to minimize their effect. The recruitment process may also give rise to privacy concerns, both in the identification of potential participants and during their enrolment. Protecting the privacy and confidentiality of potential participants throughout the research is a prime responsibility of researchers

First Contact for Research Participation

Often, someone known to the potential participant is the best person to inform them about the research and to begin the consent process. Examples include:

- A physician/nurse-investigator discussing research participation with a patient under their care,
- Administrators discussing with professional colleagues their participation in a study that the administrator is conducting,
- An athlete/researcher discussing a research project involving new training methods with fellow athletes.

Investigators who do not have an established relationship with a potential participant may ask another person who does have such a relationship to present information about the study. That person may then secure the individual's consent for a member of the research team to approach them to discuss the study. Alternatively, they may invite the potential participant to contact the research team directly.

The same provisions apply to research involving children or persons who may lack capacity. First direct contact with families, guardians, or caregivers must ordinarily be made by someone who has an established relationship with the potential participant.

Investigators must be especially vigilant in circumstances in which they may be, or be seen to be, in a position of authority or influence over a prospective participant (for example, as a teacher, supervisor, or employer). In such cases, they must act to reduce any undue influence or coercion that might compromise the participant's freedom to decide. Although studies may be introduced by people in such power relationships, it is good practice to delegate the consent discussion to someone else where possible. Providing the prospective participant with the assurance the authority figure will not be told of their decision to participate or not is another means of mitigating this potential influence.

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Opt-in Methods

Researchers may recruit potential participants by advertisements or information posters placed in suitable locations. The CHREB must review and approve such advertisements and postings before they are displayed. Information about a study may be circulated to potential participants by phone, mail or email, provided that the contact is initiated by someone with an established relationship with the potential participants (for example, a mailing from a physician's office to her patients; an email from a school principal's office to parents of children potentially eligible for participation in a classroom research project), or through publicly available contact resources (for example, social media).

Recruitment of Participants to Emergency or Urgent Research Studies

Research in emergent or urgent situations sometimes requires quick recruitment of incapacitated participants (TCPS Article 3.8). There may be insufficient time to have a recruitment conversation with them or a surrogate. In these circumstances, the CHREB may allow enrollment of the participant, with provision for deferred or regained capacity consent to be obtained as soon as possible.

Pre-Screening to Identify Potential Participants

Researchers may have no way of identifying potential research participants without access to their personal health information. Upon receipt of a justified request, the CHREB may allow other methods of identifying and recruiting potential participants in these circumstances. These may include having a caregiver inform the researcher about the patient or allowing the researcher to review admission logs or other health records to identify potential participants. The onus is on the researcher to establish that there is no other means of recruiting individuals, that access to personal health information is necessary for the conduct of the research, and that the request complies with the provisions of the *Health Information Act* of Alberta.

Incentives for Participating

Incentives are anything offered to participants, monetary or otherwise, to encourage their participation in research. Their use is an important consideration affecting voluntariness (TCPS2 Article 3.1). Although payment for research participation may be permitted, such incentives should not be so large so that they encourage prospective participants to overlook the risks of participating in the research study. For more information about participant payments, please review the CHREB's guidance document, "Payment of Participants for Research Participation".

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Recruitment Materials

All recruitment materials (e.g., posters, brochures, PowerPoint slides, invitation letters) must include the University of Calgary Logo and the CHREB's approval statement - "This study has been approved by the University of Calgary Conjoint Health Research Ethics Board (REBXX-XXXX)."

In general, recruitment materials should include the following:

- Study title – simplified as appropriate (e.g., abbreviated, or lay language)
- Purpose of the research study
- Target population
- Basic explanation of tasks and time commitment expected and location of research (e.g., lab, online)
- Provision for compensation is provided (but not necessarily how much). Do not overemphasize incentives (i.e., bold or large print).
- Study contact information/Principal Investigator's name.