

# Guidelines for Participant Recruitment

## Introduction

There are many ways to recruit participants. The purpose of recruitment material is to provide a brief explanation of your study and what participant participation will involve. This material also provides information on how participants can learn more and sign up to participate in the study. This document will provide you with:

- information that is required on all recruitment material, and
- issues to consider when preparing your recruitment strategies.

Recruitment cannot begin until the Research Ethics Board (REB) has approved your protocol. Any changes to recruitment strategies or materials **must** be reviewed and approved by the REB **before** implementation. Making changes to recruitment strategies or materials without first obtaining REB approval is a breach of the TCPS 2, the University's Ethics of Research Involving Humans Policy, and the University's Responsible Conduct of Research Policy.

It is important to remember that while you may obtain REB approval to recruit participants, other types of approval may also be required. For example, you may require approval from organizations or institutions that will help with recruitment. All relevant approvals must be in place before you begin the participant recruitment phase.

## Recruitment Material

### Required Information on Recruitment Materials

1. The University of Manitoba and all partner **logos** must be included on all materials. If it is not possible to include the logo, then the institutions must be explicitly identified in the body of the document.
2. The principal investigator's (PI's) name, affiliation(s), and UM contact information must be included on all materials. For students, your advisor/supervisor's name, affiliation(s) and UM contact information must also be included.
3. The study title, a brief description of the study **in lay language**, participant time commitment, and any inclusion/exclusion criteria.
4. Information on **how** potential participants can contact you if they are interested in learning more about the study.
5. The subject line for email communications.
6. All text that will accompany social media posts.
7. If applicable, the process of screening procedures or other eligibility-determining activities.

## Optional Information on Recruitment Materials

1. Details on compensation or honorariums. This information must not be emphasized to avoid perceptions of coercion. The size, color, and font must not be different than the rest of the material.
2. “This research has been approved by the Research Ethics Board at the University of Manitoba, Fort Garry campus”.

## Do not Include in Recruitment Materials

1. Imagery (e.g. images of dollar signs around compensation information) or language (‘your participation is important’, ‘call now’, ‘all the cool people are doing it’) that entices people to participate. Some images may also be seen as negative or provoking shame. It is up to the researcher to justify the inclusion of such images.
2. Recruitment material should **not** include the same level of specificity found in the consent form or letter of information.

## Common Recruitment Strategies

In your REB application, you must fully describe your recruitment plan and include all potential recruitment materials for review (e.g., posters, social media posts, emails, phone scripts). The recruitment plan must be **specific**.

### Snowball Sampling

If you plan on using snowball sampling, potential participants must consent to have their contact information passed on to the research team through a third party (including existing participants). If consent is not obtained, this violates Manitoba's privacy legislation (the Freedom of Information and Protection of Privacy Act (FIPPA) and the Personal Health Information Act (PHIA)).

To avoid any uncertainty on whether consent has been obtained from potential participants, we suggest that you provide participants and other individuals with your recruitment information, which the third parties then share with their network as applicable. Potential participants can then contact the research team directly for more information or to state their interest in participating.

### Recruitment within External Organizations

In some cases, you may work with an external organization to help you recruit. Often, this requires approval from the organization. You should anticipate this by including in your REB submission either:

- Documentation of the approval, or
- The permission letter/script that will be shared with the recruiting organization to obtain the approval.

Typically, the REB recommends that the organization forward recruitment material to potential participants on behalf of the researcher and include the researcher's contact information. Interested individuals can then reach out directly to the researcher for more information and/or to state their interest in participating.

The REB may allow for other forms of recruitment where adequately justified and supported (in writing) by the organization.

## Social Media Recruitment

If you are using social media accounts or websites to recruit, specify whether the account/website page is personal or professional and where the details will be posted. If you are recruiting through professional pages, make sure you obtain permission from online site moderators if/as required. Researchers should also consider the context of online forums and ensure appropriate sensitivity to the needs and customs of the groups. If using a job board or classified site, please note that these posting should be under volunteer or research work, rather than under employment.

Participants on social media may comment or reply to a tweet or posting, thereby compromising confidentiality. Be **explicit** in the posting that the participants should only contact the researcher directly as indicated. REBs will be looking to ensure that researchers have considered the confidentiality of participants and have designed recruitment procedures to protect potential participants' privacy and confidentiality. When planning recruitment strategies, researchers must take into account the level of risk of the research proposed.

## Recruitment through SONA or Survey Panel

If using an online survey panel such as SONA or MTurk:

- Specify which platform is being used,
- Upload the description that will be provided to participants through this platform, and
- Ensure that all privacy/confidentiality and compensation information is described in the REB submission.

SONA is used as a recruitment platform for students enrolled in certain courses within the University of Manitoba. Students in these specific courses are required to obtain specific research credits for course completion, and they are provided with alternate options (e.g., written review of a research article or take a quiz) in order to obtain their research course credit without participating in research (thus protecting the principle of voluntary research participation).

When using these platforms, researchers must ensure to outline the following in the REB application:

- Will any screening questions be used to limit the pool of participants viewing the post?

- What information will be visible to participants in the posting? Attach a copy of the recruitment script.

### Recruitment through Listservs

If you are using a University of Manitoba (UM) listserv or plan to recruit from a large portion of the UM community (e.g., alumni, faculty, students, staff), approval from the Survey Review Committee may be required. Please visit their [website](#) for more information.

### Recruitment within Classrooms at UM

UM students can be recruited through a UM course with the instructor's permission. Distribution may be done via an announcement before/after class, via email, posted on UM Learn, etc. Recruitment information must include a brief description of the research and the researcher's contact information. Both the approach and recruitment information must receive REB approval before recruitment can commence.

If the instructor is the Principal Investigator, measures must be implemented to minimize any perception of coercion or undue influence given the existing power dynamics. These measures include:

- Having a third party, not involved in grading or in any position of authority, recruiting and obtaining consent,
- Ensuring the instructor/PI does not know who is/is not participating,
- As much as possible, ensuring that the least amount of identifiable data is collected
- Keeping data inaccessible instructor/PI until course grades have been finalized and the grading appeal period has passed,
- Ensuring that compensation does not overly incentivize participation,
- Ensuring that any compensation impacting course grades (e.g., bonus) also includes an alternate assignment to avoid coercion, and
- Ensuring that any compensation process is done in a way that protects confidentiality and voluntariness, as described in the REB submission and Consent Form.