

Recruitment Strategy and Documents

Planning the recruitment of research participants

Exploratory phase: researchers cannot recruit any participants before obtaining clearance but may contact individuals/communities to refine research design (not collect any data)

Recruitment Risks and Mitigation Strategies

Recruitment Risk	Risk Reduction/Mitigation Strategies
Undue Influence, Manipulation, or Coercion	Avoid recruitment strategies that (1) introduce undue influence, manipulation, or coercion such as offering large incentives that encourage participants to ignore potential risk (2) withhold incentives if participants choose to withdraw their data.
Power Imbalance	Minimize power imbalances (such as instructors recruiting students or supervisors recruiting employees) by (1) emphasizing that participation is voluntary/choosing not to participate will not have an impact on grades, employment, services, or care and (2) using mitigation strategies such as recruiting through neutral third-party recruiters.
Third-Party Recruitment	Third-party recruitment is when researchers ask someone not part of the research team to recruit for them typically by circulating recruitment material. Third parties should not be asked to give contact information of potential participants to researchers. The researchers should instead prepare a study invitation message and ask the person or organization to share it. When using this recruitment method, researchers should be sensitive to the relationship between participants and the third-party recruiter to ensure that no real or perceived coercion exists.
Snowball Sampling	Use passive snowball sampling where participants do not share other participants' contact information with the researchers and instead forward recruitment materials to other potential participants.

Informative and clear recruitment documents: study details should be clearly communicated to participants in posters, emails, social media posts, scripts, etc.

- Inclusion/exclusion criteria
- What the participants are expected to do
- Withdrawal process and deadlines
- Compensation amount and conditions (or if compensation is not offered)
- Risks and mitigation strategies to protect participants
- Contact information of researchers and CUREB