RTP In-person Recruitment:
Quick Reference for Research Teams

As part of the *Right to Participate Initiative* (RTP), collaboratively led by BC Children's Hospital Research Institute (BCCHR) and the Women's Health Research Institute (WHRI), study teams conducting research at CW may now use a new in-person recruitment option that permits researchers to directly approach eligible patients about research opportunities that may be of interest to them.

This is one of several recruitment methods available to recruit research study participants. This initiative is a new offering beginning summer 2024 that supplements existing recruitment methods at CW. If and when this approach is appropriate for use, as well as how it is implemented, will vary by clinical program area and by study. Research teams should use this guide to help determine if this method is right for a particular study and, if yes, to highlight practical considerations for success.

As with all research that takes place at CW, study teams must obtain Research Ethics Board and institutional approvals (Program Utilization Forms). If you're new to research at PHSA, please visit Conducting Research at PHSA to learn more.

How to determine if the method is right for your study

When considering this approach to recruitment there are 2 important questions study teams should ask themselves:

1. **Will the people approaching patients and/or their families to introduce the study be PHSA Employees or PHSA Affiliates?**

   Where this recruitment method is approved, members of the research team who introduce the study to prospective participants must be either PHSA Employees or PHSA Affiliates.

   Not sure if your team members are PHSA Employees or Affiliates? Refer to pages 18-19 of the PHSA Data Governance Framework.

2. **Have you engaged with the clinical program leadership in the area where your research will take place?**

   Please engage leadership from the clinical program area where recruitment will happen *as early as possible* in your study planning. Early engagement ensures a collaborative process that integrates study protocols into clinical workflows as seamlessly as possible, reduces potential delays in approval processes and fosters successful outcomes for both clinical care and research.

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***Clinical program leaders must approve this recruitment method.** Within REB applications and Program Utilization Forms, researchers will be asked to confirm that the impacted clinical programs have been meaningfully engaged in the development of recruitment workflows, and that they support the use of this approach.

Setting up for success

Please consider the following when planning detailed recruitment workflows using the direct in-person approach :

- **Post your study as a research opportunity online.** Patients and families should have an opportunity to learn more about studies happening at C&W for which they have been / may be approached to participate. While this is best practice for any research, it is a **requirement** using the direct-approach in-person recruitment. To have your study posted online:
    - For research happening at BC Children's Hospital , please contact comms@bcchr.ca to post your study on Participate In Research page.
    - For research happening at BC Women's Hospital + Health Centre check YES on section 4K when completing your Program Utilization Form.
- **Determine if there is other research happening at the same time.** Often multiple research teams are simultaneously recruiting from within the same program area. This can be especially true in high-volume clinic areas. Connect with both clinical program staff and other research teams to understand overlaps in research studies and, if necessary, coordinate a process that will minimize patients or families being overwhelmed by multiple requests.
- **Who will confirm participant eligibility**? Study eligibility must be confirmed by either the study's principal investigator (or co-principal investigator) OR a member of the clinical care team before a patient or family member can be directly approached about research.
- **Is there is an opportunity to share study information with prospective participants in advance?** Patients and families have shared they appreciate when they have time to think about participating in a particular research study. If there is an opportunity to provide advance notice to patients that they may be eligible for study participation, such as with a clinic visit reminder / circulated with pre-visit materials, study teams should coordinate this with the clinical program.
- **Whether privacy can be provided to discuss potential research participation.** Patients and families should always have an option to discuss research participation in private. Please coordinate with the clinical program as appropriate to designate a private area to discuss research.
- **If it's an appropriate time to approach the patient to discuss research.** Members of the clinical care team can help to advise on this. As a courtesy, it's always a good idea to check with clinical teams before approaching patients about research. It's important to remember that, just because research teams can directly approach patients where this recruitment method is approved, it does not eliminate the need for touchpoints with clinical staff.

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Questions or feedback?

This is a new recruitment method and the Right to Participate Team is committed to ensuring this change is responsive to the needs of clinical and research teams at C&W, alike.

If you are interested in using this method for a study, have questions or feedback related to this reference guide or the recruitment model and its supports in general, please send us an email at rtp@cw.bc.ca

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