VCU IRB Guidance for Using Social Media to Recruit and Engage with Human Subjects for Research

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1. Introduction and Scope

This document offers guidance to investigators and research staff who wish to use social media platforms to recruit research participants. Social media is commonly used for conversation and interaction, but this guidance is focused on a study's systematic efforts to advertise/notify/publicize/persuade potential participants to enroll in a study (i.e. recruitment efforts) and if applicable, to retain participants.

For guidance on using social media as a means of conducting research-based interactions, and/or as a source of research data, see VCU IRB WPP XVII-9: Use of the Internet for Research Data Collection. Also refer to the University policies in the Other Issues and Responsibilities section at the end of this guidance.

For general guidance on IRB requirements for recruitment for research, and standards for creating recruitment materials, please see VCU IRB WPP XVII-2: Subject Recruitment and Compensation.

Use of social media in research is an evolving topic. Moreover, the landscape of social media is continually changing – new platforms pop up, old platforms die off, and platforms evolve in how they are used. The IRB cannot anticipate every risk or potential complication that may apply to all types of social media, and cannot anticipate, or review for, all institutional or legal issues that may impact your study that are outside of an IRB's purview. However, the risks related to use of specific social media platforms must be evaluated for each individual research protocol based on the nature of the research and focal population of study.

This guidance is fluid and therefore subject to change as new information emerges.

2. Institutional and Departmental Policies

It is the responsibility of the research team to be aware of and comply with all relevant policies that are specific to their department, and to VCU as an institution. Investigators should follow VCU's institutional standards, which can be found here: https://socialmedia.vcu.edu/for-social-admins/

Note that VCU Data Retention Policies apply to research-related materials, including social media content. Social media posts disseminated on behalf of a VCU entity are considered public records. See https://policy.vcu.edu/universitywide-policies/policies/records-management.html

3. ADA Accessibility

It is the responsibility of the research team to ensure that all social media advertisements are accessible to individuals with disabilities in compliance with VCU policies and the Americans with Disabilities Act.

For example, to allow for the use of text readers for the visually impaired, social media and email advertisements should be designed so that the text is mostly independent from the images. In other words, the art should have few or no words on top of it. Another example is to avoid using all caps, as some text readers tend to read these out one letter at a time, rather than reading complete sentences.

For additional guidance on ADA accessibility online, see:
https://webstandards.vcu.edu/requirements/accessibility/

4. Considerations and Best Practices for Using Social Media for Recruitment

The IRB will consider all potential recruitment methods with a clear justification and rationale. As with any recruitment method, researchers need to carefully consider whether use of social media is an appropriate and effective means for reaching their target study population, and design recruitment methods that adhere to ethical principles.

To protect the scientific validity of your research, and uphold the Belmont Report's principles of Justice, Respect for Persons, and Beneficence, ***when considering social media as a potential recruitment method, ask yourself the following questions:***

4.1 Is social media an appropriate and equitable method to recruit my target population?

You should consider whether or not your sample will be biased if your study depends solely (or heavily) on social media recruitment. For example, you may be inadvertently excluding populations with limited social media literacy or access to the internet (see https://www.pewresearch.org/internet/fact-sheet/social-media/).

4.2 Which social media platform(s) should I use, and why?

When choosing a social media platform, you should consider how the platform relates to your target audience and users' expectations of the platform. Different platforms have different common uses (e.g. blogging, social networks, media sharing, social bookmarking, etc.) and not all platforms may be appropriate for research recruitment.
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Researchers should consider whether a particular platform will be an effective way to reach the desired population. For example, a research study that wishes to recruit people from certain professions may consider LinkedIn, while Facebook may be more appropriate to use for recruiting participants in the same specific interest groups.

4.3 Which social media accounts should I use to post recruitment ads?

The IRB will consider different types of social media accounts used for recruitment by research teams on a case-by-case basis. There are a few considerations and best practices when choosing social media accounts.

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As a researcher, you are representing VCU, so we generally discourage using personal accounts. Whenever possible, you should use pre-existing public accounts related to the target population or accounts you have created for research purposes (such as professional network accounts, study-specific accounts, research accounts for your department or division, VCU's Clinical Trials Facebook account, etc.). Researchers should check with VCU Social Media prior to creating any study accounts. Study team members may choose to share posts originating from other accounts, but researchers should be clear when they share these posts to direct any interested parties to the original post from the official account to avoid privacy and engagement concerns.

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Personal accounts may also encourage your friends/family to share the advertisement more broadly by accounts or other platforms that may be more public, and more susceptible to attracting bots or scammers (more on this below). Relying on personal accounts to recruit for research subjects can also lead easily into snowball sampling and potentially introduce bias. VCU IRB generally discourages snowball sampling in most cases, unless an acceptable rationale is provided. For a discussion of the problems related to snowball sampling as a recruitment method for research, please see: https://www.boisestate.edu/research-compliance/irb/guidance/guidelines-for-investigators-using-snowball-sampling-recruitment-methods/

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If you feel your study presents a unique situation for which there is a justification for using personal accounts, please describe this justification in your IRB submission, and your plans to mitigate the issues outlined above. The IRB will consider these on a case-by-case basis.

4.4 How will I mitigate the risk of attracting fraudulent responders, bots, and scammers to the study?

While much of the research conducted online is minimal risk, even minimal risk to participants must be balanced by at least the potential for social benefit from well-designed, valid research. All research has the potential to attract bad-faith actors, but the nature of social media makes it much easier for these individuals to find, share, and exploit opportunities for compensation. There are even social media groups dedicated to sharing easy-to-complete and/or exploitable for-compensation surveys. Because of this, you need to evaluate your risk and mitigate it by selecting appropriate social media communities, by designing your study to be able to screen out bad-faith actors, and developing a plan for how you might identify and remove bad-faith responders from data after data has been collected. This guidance is primarily focused on recruitment, but you can find additional guidance on defensive survey designs and data monitoring techniques here: https://www.nursing.umaryland.edu/research/seminar-series/ (see August 2022 seminar "Online Research Best Practices").

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Publicly available, less moderated social media platforms or communities (such as Twitter, Reddit, TikTok, Pinterest, etc.) may be more likely to attract bots or bad-faith actors, by virtue of being easier to access than a closed Facebook support group. Similarly, consider if your social media recruitment efforts should prompt for more rigorous screening procedures.You may need to screen out individuals who might not be your target audience (for example recruiting via a dyslexia subreddit doesn't guarantee you will get individuals with dyslexia), to screen out ineligible individuals who might be willing to submit bad-faith responses for compensation, and to screen out "bots" who automatically complete hundreds or thousands of surveys to receive compensation. For example, consider if screening should involve contact with the study team or provision of additional documentation to verify identity/eligibility. Other options might be collecting IP addresses to screen out repeat responders, using bot-targeting screening mechanisms (such as CAPCHA), or structuring the screening survey to weed out unusual, repetitive, or inconsistent responses.

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Potential solutions may vary over time as this issue develops. We recommend reaching out to your department's IT services for specific recommendations for mitigating this problem.

5. Procedures and Guidance for Social Media Recruitment Plans and Materials

Once you've determined the appropriateness of using social media for recruitment, and decided on which platforms and accounts to use, you'll need to submit your recruitment plan and advertisements to the IRB for review and approval.

5.1 Describing your Recruitment Plan to the IRB

You can provide your social media recruitment plan to the IRB by either completing and uploading a document outlining your Social Media Management Plan to your IRB submission (a template is available in the Resources section at the end of this guidance) or describing the following aspects of your plan in the SmartForm:

- The platforms/spaces/groups you will utilize.
- Specific details relevant to the platform (for example, will you use paid/targeted ads, posting on specific group pages/threads [if so, which], etc.)
- The timing and frequency of recruitment activities.
- How the study team will represent themselves (as individuals or as a team). Will any accounts/logins/etc. need to be created or will existing accounts be used? How will the study team represent themselves through these accounts?
- How you might engage with users on the platform and any plans to manage or moderate content/social media interaction on recruitment posts/materials. If needed, what controls will be used to prevent potential privacy violations (such as unanticipated sharing)?
- For example, will comments be disabled, will there be an automated response directing questions about the study to be moved to private messaging, or to the study team directly outside of social media? Different types of studies will have different privacy considerations, so the IRB will consider the appropriateness of this plan on a case-by-case basis.
- Any policies, rules, or norms for research on the platform that you may be expected to follow. Some social media spaces might have their own policies, rules, or norms regarding research conducted on the platform. Other platforms may allow users to post their own "policy" (e.g. governing such things as foul language, hate speech, advice against posting personal information, etc.) and this should be submitted to the IRB for review. It is up to the research team to ensure that they are complying with any policies, rules, or norms regarding use of these social media spaces.

5.2 Creating Recruitment Materials

As with all research advertising, the IRB will need to review and approve the final and complete versions of *any* materials/posts/scripts/images/videos/etc. that are recruiting for the specific research study in question, *prior* to these materials being distributed. This could include submitting all planned text, layout, and formatting for study-specific social media accounts (like a mockup or screen shots of proposed "about" pages, "home" page, or other pages.)

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Social media recruitment materials are reviewed and approved by the IRB in the same manner as all research advertising, and should follow the same standards. For a description of these standards, please refer to VCU IRB WPP XVII-2: Subjects Recruitment and Compensation.

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Considerations when Creating Advertisements for Social Media:
- Consider the specific platform, and ensure your posts and images will fit the format, word count, and image sizing for typical posts on the site to ensure the advertisement can be posted as it was approved by the IRB.
- For example, vertical (portrait layout) flyers are standard when printing and posting paper flyers in physical locations, but horizontal (landscape layout) images may be needed to accommodate digital marketing platforms like social media.
- Be aware that there may be other, non-IRB related considerations for how you create/format your advertisements for social media (i.e. copyright issues for images, ADA compliance, department or institutional branding standards, etc.).

- See the "Other Issues and Responsibilities" section below for additional guidance and resources.
- Avoid images that may be offensive or inappropriate for the platform and/or study.
- Whenever possible, use diverse and inclusive language and imagery in your social media recruitment materials as you would with any other study recruitment materials.
- Avoid images and text that highlight monetary compensation (such as dollar signs, money bags, bold or italic font, putting compensation in the title, etc.), as these may increase potential coercion, and may attract bots or scammers seeking payments.
- Text for posts should always clearly identify the activity as a research study.

5.3 Guidance for Submitting Social Media Advertisements to the IRB

- Submit all text for researcher-initiated posts and planned responses, and submit all images that may accompany the text.
- Another acceptable approach would be to create many different types of posts, as the IRB will typically accept "mix and match" content (images and texts that can be combined in various ways to create posts).
- These may be submitted in batches. Please try not to submit more than 20 images and captions at once, to avoid review delays.
- Please upload all social media content in 1 file, rather than individual files for each content item, as this can make your Documents list more difficult to manage.
- Please note that this format is for creating recruitment content for a single study. The IRB approves materials on a study-by-study basis.

6. Longitudinal Research and Social Media Engagement for Participant Retention

While IRBs are required to review and approve all aspects of research *recruitment*, there are situations where there is room for flexibility when reviewing and approving *non-recruitment* posts from study-specific social media accounts that are created to maintain contact with enrolled participants as part of longitudinal research. There are several strategies your study team can employ to potentially avoid having to submit each individual non-recruitment post to the IRB for approval. These strategies will be considered by the IRB on a case-by-case basis, within the context of each study.

6.1 Strategies for managing non-recruitment social media engagement

- **Provide the IRB with examples**. If the study team knows the specific kinds of posts they will likely be sharing (such as recipes, quotes, or other similar, categorical posts), researchers can provide the IRB with sample posts of how they intend to engage.
- When providing examples, it is important to clarify the boundaries of your established "rules" in what you will post, and to update the IRB if you make changes to your engagement strategy.
- **Submit posts in batches to the IRB.** As suggested in the recruitment post section, submitting a group of posts (or example/template posts) together in advance, rather than one by one, can help your study avoid unnecessary multiple submissions with engagement posts.
- **Provide the IRB with an overview of your general rules or standards for posts.** For example, if you plan to post health-related articles, set standards for the specific sources you will use, and explain why these are appropriate/reputable.
- Describe how you intend participants to interact with these posts (i.e. will posting be one-directional or do you anticipate soliciting comments or other responses?).
- As a reminder, any posts that you will use to collect research data from subjects, or recruit subjects for this or other research studies, are *not applicable* to this strategy, and would be considered research measures or recruitment materials that require IRB review and approval prior to use.

7. Non-Research Social Media Engagement

The IRB is required to review and approve all study-specific recruitment materials and/or accounts. However, the IRB recognizes that researchers, departments, and labs have social media accounts that may discuss research and other professional activities more broadly. Content or accounts that discuss research in general terms, describing non-study specific lab/department activities, and/or completed research are not required to be submitted for review and approval. Examples may include: photos of your lab members or a post of results of a completed study. Content that does discuss one or more specific research studies and direct users to information about how they can find out more information and/or enroll in the study may need to be submitted for review and approval. When in doubt, please contact your IRB staff member for guidance on whether specific content requires IRB approval.

8. Other Issues and Responsibilities to Consider Before Submitting to the IRB

8.1 Social Media Platforms' Terms of Use

It is the responsibility of the research team, when designing a protocol, to understand the social media site terms of use and to be aware of any research or recruitment-related restrictions on the social media sites through which they intend to conduct their recruitment activities. This includes a site's advertising, privacy and prohibited content policies.

8.2 Copyright Law

It is the responsibility of the research team to ensure that they have the rights to use any photograph or illustration in recruitment materials. Services are available that offer free stock imagery and art, such as Pixabay and Unsplash, or have purchase options, such as Getty and Shutterstock. There are also VCU and VCU Health photo libraries that are accessible with a VCU eID.

For additional guidance on copyright and fair use, see: https://www.library.vcu.edu/research-teaching/publishing/copyright/

9. References
9.1 Related University Policies
VCU's institutional standards for social media admins: https://socialmedia.vcu.edu/for-social-admins/
ADA accessibility online:https://webstandards.vcu.edu/requirements/accessibility/
VCU's Data Retention Policies: https://policy.vcu.edu/universitywide-policies/policies/records-;management.html
Guidance on copyright and fair use: https://www.library.vcu.edu/research-teaching/publishing/copyright/

9.2 Other Resources
Boise State Guidelines for Investigators Using Snowball Sampling Recruitment Methods: https://www.boisestate.edu/research-compliance/irb/guidance/guidelines-for-investigators-using-snowball-sampling-recruitment-methods/
UMB August 2022 Research Seminar: "Online Research Best Practices" (video and slides available) https://www.nursing.umaryland.edu/research/seminar-series/
VCU's Clinical Trials Facebook account: https://www.facebook.com/pg/VCUClinicalTrials/
VCU and VCU Health Photo Library (requires a login to access): https://brand.vcu.edu/site/index

9.3 Related VCU IRB Written Policies and Procedures
VCU IRB WPP XVII-2; Subject Recruitment and Compensation: https://research.vcu.edu/media/office-of-research-and-innovation/humanresearch/VCUIRBWrittenPoliciesandProceduresv9-28-2020.pdf#page=255
VCU IRB WPP XVII-9; Use of the Internet for Research Data Collection:

10. Example Format of a Social Media Management Plan

Platform Name	Facebook	Twitter	Add columns for each social platform used
Study Name Used on the Platform			
Who Owns the Page/Account? (Is it a study-specific or a department/lab account? Who will own/manage it?)			
Audience Trying to Reach with this Platform			
Types of Content /Content Strategy (describe everything that might be used)			
Posting Frequency (min and max)			
Audience identifiability (are user's real names used?)			
How Audience Will Interact - will the study team ask people to interact or repost/forward? - how will the study team manage/curate the account and comments? - if a community is created, how is it curated/managed?			

Privacy Settings			
Plan for Account Closure			