

Guidelines for Recruiting Community Advisory Board

From Haera Han, PhD and the PLAN Study Team

Community consultation is a crucial step to ensuring that a research team is effectively responding to the perceptions and needs of local communities involved in the project.

While most research projects can benefit from such engagement, it can be especially helpful when dealing with research sites that have their own history of interactions and collaboration with the surrounding population.

To build on the links with the project and communities, the research team needs to recruit local stakeholders to create a community advisory board (CAB).

Purpose

A community advisory board will guide the study team's preparation for and implementation of the proposed study. The main role of the community advisory board is to advise and inform on community perspectives, needs, and trends.

The CAB might suggest:

- How to build trust with the local community
 - How to recruit participants
- How to disseminate the results to appropriate audiences

Additionally:

- The advisory board can serve as a source of advocacy.
 - The advisory board can offer ideas for program changes or improvements.

Guiding Principles

When establishing an advisory committee, every effort should be made to follow the core principles of community-engaged research:

Center the voices of those who are directly impacted by the outcomes of the design process.

Honor and uplift traditional, indigenous, and local knowledge and practices.

Work towards sustainable, community-led and community-controlled outcomes.

View change as an emergent, accountable, accessible, and collaborative process, rather than as a point at the end of a process.

Share knowledge and tools with communities.

Other best practices include:

Build genuine connections.

Don't assume that people know everything – always clarify your meaning and intent.

The principal investigator should offer a lot of freedom to the project team to lead.

Create a feedback loop to share how the group's inputs and recommendations create impact.

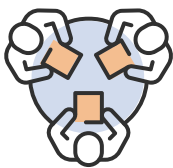
Offer different choices to engage in big and small groups based on comfort.

Consider the team's needs for accessibility, such as bilingual interpretation.

Support members' growth and journey.

Establishing a CAB

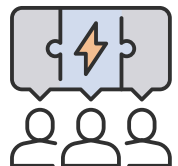
Generally, the process includes the following steps:



1

Identify the CAB members

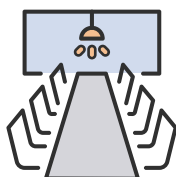
2



Clarify purpose and roles
before long-term commitment

3

Determine meeting logistics



4

Evaluate the experiences of the members



1. Membership

Membership is related to your study's aims, target populations, and sites. The members may understand clinical trials and its benefits to the populations.

The following list contains examples of possible community advisory board members:

- Community leaders
- Church leaders (pastors and pastors' wives)
- Senior-related facility workers (adult daycare center, senior apartment, nursing homes)
- Home health and care agencies
- Hospitals and clinics
- Primary care providers, especially those from the population(s) of your study
- Patients and caregivers
- Director or staff of local community organizations
- Community Health Workers

The study team can use the worksheet at the end of this document to help identify potential CAB members.

Once you have completed the worksheet, reach out to the individuals to gauge their interest and fit and clarify anticipated roles and level of commitment.

2. Clarifying Roles and Commitment

Clarifying roles and commitment is an important step for setting expectations around what the CAB members will provide and what they will gain from the experience. To do this, it is helpful to draft commitment letters that are signed and dated by each member.

Suggested Elements of a Commitment Letter:

1

Introduction

Describe the study.

2

The purpose of the CAB

e.g. To inform the study team of community values and norms.

3

The individual members' roles

e.g. Give feedback on specific aspects of ideas and design, and assist in dissemination of study results

4

Anticipated time commitment,

e.g. 10 hours per year for 2 years

5

Compensation

e.g. \$100 per hour for a total of \$2,000

3. Meetings

Meeting frequency may vary according to the study phase. Generally, meetings happen more frequently during the planning phase of the project.

For a five-year study, this might look like:

- The planning phase (year 1) – **bi-monthly or more frequently**
- The implementation phase (Years 2-4) – **monthly or quarterly**
- The analysis and reporting phase (Year 5) – **monthly**

Meetings may be in person, online, hybrid, or a combination. The appropriate format will depend on who comprises your advisory board and their unique situations.

Some considerations include:

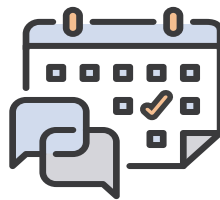
Transportation

For in-person meetings, does the location have parking?
Is the location accessible via public transportation?
Is the project able to reimburse for parking/travel expenses?



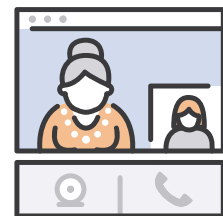
Time of Day

Are the members able to meet during the study team's workday or do they need to meet in the evenings/weekends?



Technological Literacy

Will the members feel comfortable joining remotely?



Technological Access

Do the members have access to a smartphone or computer to be able to join via zoom?



Meeting Length

How much time is a reasonable request to meet the advisory board's goals and fit with members' schedules?



Language

Do all the study team and advisory board members speak the same language or will you need to hire interpreters?



4. Evaluation

A CAB involves ongoing relationship building; hence, research teams should consider evaluating team members' perspectives of team dynamics, the process of working together, and success in working as a team. Such evaluations will offer further insight into strengths and weaknesses (or room for improvement) for the team to work better together.

Frequency and timing of evaluation may differ depending on the team, but it would be helpful to have team climate assessments before trial launches (but after team orientation and relevant training on the trial) and after completion of relevant trial milestones (e.g., meeting the recruitment target).

Evaluation questions may include:

Are team members comfortable showing limits or gaps in their knowledge?

Do team members value being part of the team?

Do team members feel that their opinion is taken into consideration by other project team members?

Do team members feel comfortable with the way decisions are made in the project?

Do you agree as a team on the communication norms/strategies/approaches?

Has the team developed norms for collaboration?

Does the team proactively identify sources of conflict and use strategies to address them before they cause conflict?

Do team members encourage open debate and discussion to productively resolve disagreements within the team?

Does the team engage in self-reflection to improve how it works together?



Social Innovations
team at ICTR

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Who can be part of the CAB? - Please suggest one or more candidates for CAB. Suggestions can be inspired from the stakeholders we identified previously.

STAKEHOLDER	ORGANIZATION	PERSON'S NAME	REASON (e.g, skills, experience, etc.)	CONTACT INFORMATION
Caregivers				
Church leaders: Pastor / Pastor's wife				
Social Workers				
Senior Centers				
Adult Day Care				
Senior Apartments				
Home Health Agencies				
Hospitals or Clinics				
Nursing Homes				
Regional or National Organizations				
English Speaking or Ethnic Media				
Other				