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INCENTIVES AND SENSIBILITY

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Introduction

- Incentives acknowledge the time, effort, and value participants bring to the study
- How people shop and do banking has changed
- Types of studies have changed

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Attendees Will Learn

- The IRB's policies and perspectives on incentives
- How to determine a reasonable dollar amount
- How to determine the type of incentive
- The pros and cons of the different kinds of payments that can be offered

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Definitions

- Payment
  - *Reimbursement*
  - *Compensation*
  - *Incentives*

Subject Payment HSD guidance:
https://research.washington.edu/research/hsd/guidance/subject-payment/

Definitions (continued)

- *Undue influence*
  - Task for researchers and IRB is to minimize influence to mere influence but do not need to eliminate influence entirely
  - Payments (and incentives) have historically been conservative, but there is increasing recognition that appropriate compensation can reduce financial barriers to participation
  - Reimbursement and compensation (when calculated correctly) not likely unduly influential

Incentives: Factors to Consider

- Population-specific issues
  - Does incentive go to parent or child?
  - Does the type of payment create a link between sensitive information and identifiers?
- Extent of consent process
  - Are risks clearly explained to minimize influences of payment on enrollment choices?
  - Would a method to verify comprehension of consent information help reduce undue influence?

Consent and IRB Protocol Language

- Best practice to include in both IRB protocol and consent form:
  - Total amount,
  - Time frame for payment,
  - Method of payment, and
  - If any payments are pro-rated

Consent and IRB Protocol Language

- Example consent language:

  You will receive up to $200 total. You will receive $30 for each completed survey (up to $180) and an extra $20 for completing all 6 surveys within 6 months. Payment will be provided after each survey and sent via e-gift card to your email within 4 weeks.

How Much? (IRB considerations)

- Calculate *compensation* and *reimbursement* based on time and predicted expenses, not risk
  - How much are participants paying to participate in study (e.g., parking, lodging?)
  - What amount may make the time spent in the study as attractive as other uses of their time (e.g., lost wages, burden of invasive procedures)?

How Much? (IRB considerations)

- *Incentives* can be tied to risks and enrollment goals
  - Participants may correlate size of incentive with the level of the risks
  - Would higher incentives attract more and varied participants?

How Much?

- Use multiples of a set dollar amount (ex: $25, $50, $100)

- The IRS increased the threshold for issuing Form 1099 MISC for research payments from $600 to $2000
  - UW set threshold of collection SSN at $1500

Types of Incentives

- Consider what would be best for your participant group

- Involve your fiscal department early on
  - They may have a process in place
  - Go in with a plan and the rationale

Checks

- Pros
  - Good for reimbursement of expenses

Physical Gift Cards

- Cons
  - There may be a limit on how many cards from each retailer can be purchased on one departmental credit card

Electronic Gift Cards

- Cons
  - There may be a limit on how many cards from each retailer can be purchased on one departmental credit card
  - Not everyone shops on line

Cash

- Cons
  - Risk of theft or loss puts more responsibility on the study team

Visa (US Bank Rewards Cards)

- Cons
  - They will leak funds after a year
  - Known limitations
    - Not able to use tap and pay card readers
    - Not able to use at a gas station pump

Zelle and Bank Transfer

- Pros
  - Good for larger dollar amounts
- Cons
  - Social Security Number is collected regardless of the amount

Sensibilities

- Allow for flexibility
  - IRB Protocol and consent form language
  - The amount and type of incentives might change over the course of the study
- Proposed incentives seen in HSD have rarely been considered unduly influential

Sensibilities

- At the time of consent, set reasonable expectations with participants about when they can expect their incentive

- Helpful online resources
  - Finance Services
  - Human Subjects Division

QUESTIONS?

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