

## EMAIL RECRUITMENT MESSAGE FORMATTING REQUIREMENTS AND TEMPLATE – last revised 9/1/21

1. If your planned recruitment process involves emailing Texas State students, staff, faculty or other individuals using an active Texas State email address, the IRB will require a draft of your recruitment email. All research email messages must conform to the format in this template per [UPPS 02.02.09](#).
2. Information resources residing at or administered by Texas State University are strategic and vital assets belonging to the people of Texas. Texas State can give an individual access to these resources in a manner consistent with the individual's institutional affiliations and roles in compliance with established laws, regulations, policies, and controls. The university will hold individuals accountable for their actions relating to such access (see TAC 202.70 and TAC 202.71). Refer to [UPPS No. 04.01.02, Information Resources Identity and Access Management](#).
3. Surveys are important tools for collecting information as part of the evaluation process. Refer to the review and approval procedures outlined in [UPPS No. 01.03.05, Administrative Surveys](#). This policy describes the process by which Texas State approves and schedules all administrative surveys to ensure high quality, avoid duplicate information, achieve adequate response rates, and collect useful data upon which to base decisions. However, if you have received IRB approval UPPS No. 01.03.05 will not apply.
4. Reference [ITAC's request forms](#) for information on obtaining group mailing lists.

### Formatting Requirements

1. **Address Line.** The Principal Investigator (PI) should employ measures to avoid disclosing the email addresses of potential research subjects to others. Common techniques include the use of:
  - Individually targeted messages (only one address in 'TO:' line) per message
  - Group targeted messages with all recipient addresses in the 'BCC:' line
  - Consider using [Mail Merge](#) in Microsoft Word and Outlook paired with adding recipients in the BCC field to ensure confidentiality
2. **Subject Line.** The PI shall use a standard subject line formatted as follows:
  - 'Subject: Research Participation Invitation: <Project Topic or Key Words>'Thus, the 'Subject:' line always begins with the phrase 'Research Participation Invitation' and ends with a phrase or key words describing the nature of the research.
3. **Email Message Body.** The email message body should:
  - free of special font effects such as color, bolding, or highlighting.
  - include all pertinent information in the message body. (purpose, **the reason for the recipient's selection, a statement of anonymity or confidentiality, the anticipated time required for participation, the voluntary nature of participation, anticipated benefits and any incentives for participating**)
  - if supplemental information is necessary, hyperlinks (to the supplemental information) are preferred over attachments.
  - **The first sentence of the message body must start with the below sentence:**

“This email message is an approved request for participation in research that has been approved by the Texas State Institutional Review Board (IRB).”

- The body **must close** with the following paragraph:

To participate in this research or ask questions about this research please contact (insert **PI's and faculty advisor's Information** including the PI's telephone and email)

This project [insert IRB Reference Number or Exemption Number] was approved by the Texas State IRB on [insert IRB approval date or date of Exemption]. Pertinent questions or concerns about the research, research participants' rights, and/or research-related injuries to participants should be directed to the IRB chair, Dr. Denise Gobert 512-716-2652 – ([dgobert@txstate.edu](mailto:dgobert@txstate.edu)) or to Monica Gonzales, IRB Specialist 512-245-2334 - ([meg201@txstate.edu](mailto:meg201@txstate.edu))

## Recruitment Email Message Template Example:

Replace the red and bracketed [ ] text below, with text appropriate for your approved research.

To: [Use this line for individual addresses or your own address if BCC line is used]  
From: [Principal Investigator]  
BCC: [Use this line when sending the same email message to multiple addresses]  
Subject: Research Participation Invitation: [Research project title, topic or key words]

This email message is an approved request for participation in research that has been approved by the Texas State Institutional Review Board (IRB).

Dear XXX,

[Text of recruitment email message goes here. State the purpose and anticipated value of the research project, the reason for the recipient's selection, a statement of anonymity or confidentiality, the anticipated time required for participation, the voluntary nature of participation, and any incentives for participating.]

To participate in this research or ask questions about this research please contact me at [insert your name, phone number and email address.]

This project [insert IRB Reference Number or Exemption Number] was approved by the Texas State IRB on [insert IRB approval date or date of Exemption].

Pertinent questions or concerns about the research, research participants' rights, and/or research-related injuries to participants should be directed to the IRB chair, Dr. Denise Gobert 512-716-2652 – ([dgobert@txstate.edu](mailto:dgobert@txstate.edu)) or to Monica Gonzales, IRB Regulatory Manager 512-245-2334 - ([meg201@txstate.edu](mailto:meg201@txstate.edu)).