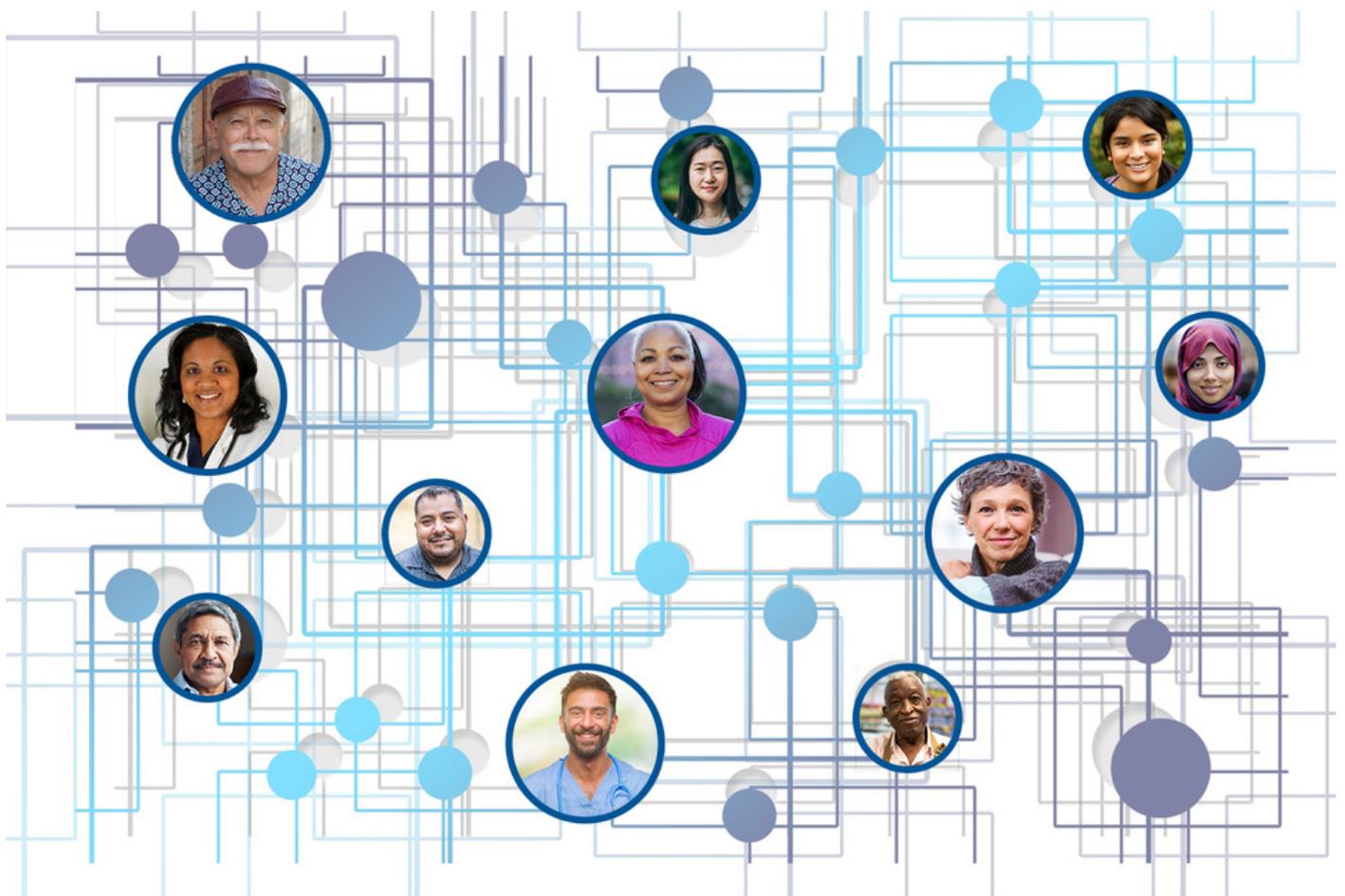


*The following resource contains guidance and templates for creating effective print materials for your research project recruitment and retention efforts.*

*Please note the photos in the templates must be replaced by stock photos that UAB owns or a free image. Please contact [ccts@uab.edu](mailto:ccts@uab.edu) with questions regarding use of this document.*

JULY 2022, V.2

RECRUITMENT INNOVATION CENTER  
RECRUITMENT & RETENTION MATERIALS  
CONTENT + DESIGN TOOLKIT



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# INTRODUCTION

## Toolkit purpose & considerations

The [Recruitment Innovation Center \(RIC\)](#) works in partnership with researchers/study teams to provide tailored support and advice for study recruitment and retention. The **RIC Recruitment Materials resource line** creates study materials, provides feedback on already-existing materials, and shares templates with study teams to optimize participant recruitment and retention.

The recruitment and retention materials content + design toolkit was created to help researchers and study teams learn about some of the **benefits** of having these materials, and provides an **overview** of what to consider before and during the process of developing them.



The guidelines, templates, and resources within this toolkit are **intentionally centered around our partners in research - study participants**. A common thread throughout is the importance of creating a combination of materials that **promote diversity and inclusion** in order to authentically reach potential participants, including [populations who have been marginalized and/or historically excluded from clinical and translational research](#), such as:

- people from marginalized racial, ethnic and gender groups
- populations of lower-income and/or educational attainment
- people with physical or intellectual disabilities

### Key to call out boxes:

We have used color-coded call out boxes throughout the toolkit to highlight RIC tips and recommendations, advice from Community Engagement Studio experts, links to resources, and purposes for different types of recruitment and retention materials. Call out boxes are organized as:

Notes, Tips & Recommendations

Community Expert Advice

Spotlighted Resources

Purpose of recruitment/retention material

To learn more about the RIC and the resources we offer, visit the [Trial Innovation Network website](#), or contact us at [info@trialinnovationnetwork.org](mailto:info@trialinnovationnetwork.org)

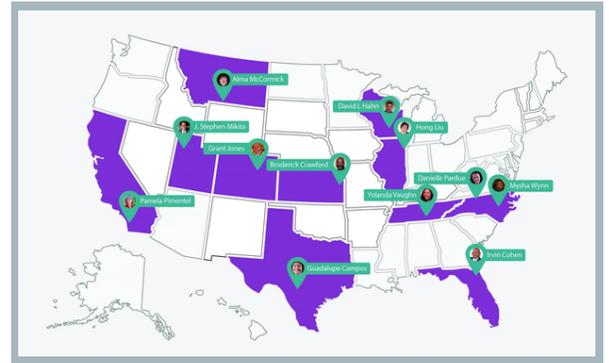
TRIAL INNOVATION NETWORK



# INTRODUCTION

## Community engagement

This toolkit includes in-depth feedback from the [RIC Community Advisory Board \(RIC CAB\)](#). The CAB is comprised of 12 members who represent various urban and rural regions across the U.S. They offer perspectives of **diverse populations**, and bring vast experience from their life's work in public health and community organizations. Together, they provide meaningful recommendations and guidance to our RIC team in creating innovative strategies and materials which reflect the needs, priorities and values of the broader community.



Some information contained in this toolkit has also been informed by potential research participant and community stakeholder feedback obtained during **Community Engagement Studios** with representatives across the country and with a variety of disease conditions.

As a result, the recommendations, templates, and resources have been **intentionally and meaningfully informed** by thought leaders and research participants from historically marginalized communities.

### IMPORTANT NOTE

This toolkit is not comprehensive - there are many nuances in creating materials for specific populations and disease conditions. We encourage study teams to use this toolkit to fit their study-specific recruitment & retention needs.

### DEI RESOURCE

[MRCT Center - Achieving Diversity, Inclusion, and Equity in Clinical Research](#)

### Important considerations in creating your materials:

- **All content should be IRB-approved.**
- Print materials should **match the same IRB-approved branding and messages** as other recruitment materials for the same study.
- **Check with your institution** for any additional guidelines and requirements regarding developing print materials.

# INTRODUCTION

## Know your audience

Materials are a traditional marketing method used to increase awareness about the study, share eligibility criteria, and inform potential participants how they can learn more about or join the study.

### When developing recruitment & retention materials:

- **Know your audience**
- Use **best practices** for content, messaging and design
- Create materials that reflect the diversity of participants - this may mean creating **multiple versions tailored to different communities** and translation into other languages
- Be sure to **budget for materials up front** (image/design costs, print costs, distribution)
- **Ask potential participants/community members for feedback** on your materials ([HHS - developing culturally-appropriate materials](#))

Knowing your audience - age, gender, educational attainment/SES, religion, language, culture - is key to developing your message. Customize materials for different audiences based on these factors.

**Tailor your messaging and content design around your audience.** Some individuals and groups will respond better to one message and design, with others will respond differently. It's important to understand your audiences' respective values in order to create thoughtful, engaging materials.

## TIPS

Use images that include potential participants and their loved ones.

Ask potential participants for their feedback on messaging, images, and use of color in study materials.

Plan for materials up front (i.e. budget for creating and printing materials; staff time; timeline for creation, including feedback).



# INTRODUCTION

## Evaluation

A vital process that is often overlooked, is **documenting and measuring the implementation, use, and effectiveness of recruitment and retention materials**. Utilize methods to document and track the "who, what, where, when, and how" of your materials. This will help you determine which materials or combination of materials are most helpful in raising awareness about the study, recruiting and enrolling participants, and facilitating retention. Ongoing tracking will also assist with determining if new recruitment, retention, and educational materials are needed, and may also help you plan for your future studies.



### Measuring implementation of materials for multi-site trials:

- Document and track **what** materials teams are using, **how** they are using them, and **where** (e.g. brochures placed in XX number of waiting rooms at sites A, B, C).



### Measuring use and effectiveness of materials:

- **Ask participants how they heard about the study.** Make sure this question is included on any intake or screening forms and has received IRB approval.
  - Can **“follow” potential participants through to study completion** to determine the impact materials have on enrollment and retention.
- Build in **systems and processes to track use and uptake of materials** (e.g. QR code scans, “clicks” on social media ads, website traffic) and monitor these throughout duration of the trial.
- If resources are limited, **consider precise effectiveness measures** that include the cost of execution (e.g. cost per call, cost per randomization).

# CONTENT

## Messaging

Identifying and utilizing a study's primary message is the single most important communication objective to achieve. A **consistent message across all study materials** sets the foundation for everything that follows.

**Messaging should be clear, concise, lay-friendly and accessible to those who may not have participated in research before.** Access plain language resources at [MRCT Center of Brigham and Women's Hospital – Health Literacy in Clinical Research website.](#)

## Reading Comprehension

As a general rule, text should be written at about a **6th grade reading level**.

Avoid using medical/research jargon. For guidance on replacing jargon with everyday words, [click here](#). ([Click here](#) to access additional CDC resources on health literacy and plain language tools).

- Any **medical terms should be simplified** or clarified (e.g. replace “hypertension” with “high blood pressure”). [Click here](#) to access the CDC plain language thesaurus for medical terms.
- **Avoid medical acronyms** unless commonly used by the general public or specific population the material is designed to help recruit (e.g. “MS” is a term commonly used by the general public for “multiple sclerosis”, whereas “TBI” is not a term used commonly by the public for “traumatic brain injury”).
- Rather than spelling out the words of the study acronym, consider including a **brief statement about the purpose of the study**.
- Use terms **“research study”** or “study” rather than “trial”, unless you are going to describe what a clinical trial is in plain language.
- Use **inclusive phrases** such as “able to join” rather than “eligible.”

### READABILITY RESOURCE

[StoryToolz](#)

### COMMUNITY EXPERT ADVICE

Utilize study names that are clear and easy for participants to understand.

Use wording that is personable.



Microsoft Word has a [readability and grade level assessment tool](#) you can utilize for determining grade reading level and reading ease.

# CONTENT

## Document Language

The title of each recruitment piece should be phrased as a **"call to action"** to potential research participants that indicates the study's goal or potential benefit of the study. For example: "Join us in the fight to..." or "Together we can help prevent..."

Include language in the materials that encourages potential participants to **discuss the study with their health care provider, caregiver and/or loved ones** to help them decide if the study is a good fit for them.

For studies that provide participant compensation, add a statement such as "If you join the study, you will be compensated for your time". We recommend that you do not state the dollar amount for the compensation on recruitment materials, as this could be coercive. (Check with your local IRB for further guidance.)

Include a **call to action** for potential participants **to contact the study team** in order to learn more about the study. Be sure to include:

- a **name, phone number** (direct line), and **email address** for the study contact
- the **URL and/or QR code** for the study website (if applicable)

As a general rule, include a:

- **statement about voluntary participation** in the research study (e.g. "Your participation and involvement in the [insert study name] Study is completely your decision. You are free to leave the study at any time.")
- **"thank you" statement** for those who participate in research studies

Any **retention materials should be personalized** by including:

- the **participant's name**
- a **handwritten note** (cards)

### CONTENT & DESIGN TIPS

Be brief, but precise about what is being asked of the participant.

Contact numbers should always be in the form of a direct line to a research coordinator / study staff who can answer the call promptly.

### COMMUNITY EXPERT ADVICE

Utilize inclusive communication techniques and culturally appropriate messaging.

Use terms to build trust, establish empathy, and avoid stigma.

# CONTENT

## Font

Fonts are an often overlooked -- and yet very important -- component of messaging. Fonts add value to your text and help readers to perceive information from the text. The correct choice of color, font and size are vital for reaching your target audience.

Text size, style and spacing are especially important with studies seeking **middle-aged or older adults, those with possible vision impairment, or participants with low literacy skills.**



### Size

Text should be **at least 12-point font size.**

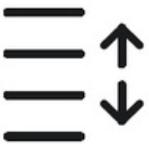
Titles and headlines should be at least 13-point or larger.



### Style

Use **font styles that are simple and easy to read**, such as Arial, Calibri, Verdana, Helvetica.

Avoid using scripts and more decorative typestyles.



### Line Spacing

Line spacing is the distance between lines of text. For your materials, use a line spacing that is somewhere between 1.2 and 1.4. that of the font size.

For reference, **single spacing is 1.0:**

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex.

And **double spacing is 2.0:**

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut al.

## CONTENT & DESIGN TIP

Use bold face type when emphasis is needed – keep italics at a *minimum*.

# CONTENT

## Layout

Well-designed materials can serve as a perfect introduction to a study. Accurately distributed, brochures, flyers, newsletters or other materials can help expand visibility.

Layout is the composition of headings, body text, white space and imagery. An effective layout not only looks attractive, but also helps the viewer understand the message. Layout is key to creating user-friendly, engaging designs.



### Easy to Read Layouts

Use shorter blocks or “chunks” of text and break up with photographs and simple figures. This can also be done by using subheadings and bullets.

Use plenty of **white space** at the margins, around pictures/figures, and between sections for improved ease in reading.



### Brochures

- **Organize sections in a “Who, What, When, Where, Why” format.**
- For back flap, include a **section about why the study is important** from the perspective of potential participants. If the study has already begun, this section could include participant testimonials (first name, last name initial for confidentiality).

“**Why is this study important?**” section should:

- have approximately **2-3 bulleted statements** that help the participant connect with why the study is important (i.e. to those who have the condition, for future generations)
- include a **statement about voluntary participation in the study** (e.g. "Taking part in the [Study Name] Study is up to you. If you join, you can leave the study at any time.")

### DESIGN TIP

Use simple, consistent design with continuity of fonts, colors, and images.

### COMMUNITY EXPERT ADVICE

Highlight the benefits of participating and how it could improve quality of life and/or how this benefits future generations.

### HEALTH LITERACY DESIGN RESOURCE

[OASH Health Literacy Online](#)

# DESIGN

## Images

The **photo(s) on the front of your materials** should reflect the primary populations you are trying to recruit. This is **especially important for marginalized populations and those historically excluded from research.**

**Images in materials should be inviting, colorful, and show people who look approachable** (see provided examples to the right).

**Utilize photographs of people who represent the:**

- **demographic diversity** of the disease/condition incidence in the population (i.e. disease burden)
- **inclusion/exclusion criteria**

Consider including a photo of a potential participant having positive interaction with a clinician or researcher. For minoritized populations, use an image of a **clinician who is racially/ethnically congruent** with the participant in the image (i.e. looks like them).

Include images that include potential participants **with their loved ones/family members**. For conditions that have a genetic component or for middle age and older adult studies, be sure to **include inter-generational photos.**



### DESIGN TIPS

Use images that are relevant to the topic.

Increase clarity by integrating pictures and simple graphics that illustrate study tasks and concepts.

# DESIGN

## Images

There are many photo sources available for you and your team. Some of these are free resources and some of them are paid.

Free resources are very budget friendly, but may not always have photos tailored to your study needs.



### Free Photos

Always comply with copyright restrictions.

- [CDC - Public Health Image Library](#)
- [National Cancer Institute Visuals on Line](#)
- [The Noun Project](#)
- [Unsplash](#)
- [Pexels](#)
- [Pixabay](#)
- [Nappy](#)
- [Centre for Ageing Better](#)



### Paid Photos

- [iStock](#)
- [Adobe Stock](#)
- [Shutterstock](#)
- [TONL](#)

## DESIGN TIPS

Not all photos are free or available for public use - be sure to read copyright restrictions and licensing information.

You may choose to use photos of local people rather than stock images.  
Check with your institution about access to images of local people  
(requires photo consent from individuals).

# DESIGN

## Color + Logo



### Color

Color matters in every sort of communication, so be sensitive to your color schemes. Consider incorporating **disease/condition awareness colors** in recruitment materials (e.g. red for heart disease, pink for breast cancer).



**When considering background and text color choices, make sure there is a high enough contrast.** For instance, white text on a deep purple background is readable, while white text on a light pink background is not.

Lack of contrast in design, creates eye strain for potential participants, especially for middle-age and older adults, as well as those with visual impairments.

It is always helpful to save the RGB, CYMK, and HEX color codes you're using for any future design documents.



### Logo

A logo grabs attention, makes a strong first impression, is the foundation of your study's identity, is memorable and is expected by audiences.

Incorporate study and institutional logos, as well as the logo for the study sponsor (funding agency/pharmaceutical company) for transparency in who is conducting the study and how it is funded (see templates for suggested places to place logos on study materials and for recommended logo size).

If you need a logo to be fully scalable, it should be created in Illustrator as a vector shape and saved as an .ai or .eps file.

# DESIGN

## QR codes

Adding a QR code to your printed materials is a useful tool that allows potential participants to scan a code from their smart device which can direct them to more information online.

### What is a QR code?

A QR code -- short for "Quick Response code" -- is an Atrix barcode that's machine-readable. It contains information about the item to which it is attached, such as data for a locator, identifier or tracker that points to a website or application.

### How do they work?

**Today's QR codes are images that can be read by a Smartphone camera.** When a Smartphone scans the code, it translates that information into something people can understand.

### How can you use them?

Below are some options you can direct QR codes to for your study:

- Direct customers to a landing page/website
- Dial your phone number
- Send a message
- Send an email
- Download apps
- View business location
- Direct customers to social media pages



### Resources for creating QR Codes

- [Beaconstac](#)
- [QR-Code-Generator.com](#)
- [QR Code Monkey](#)
- [Scanova](#)
- [The-QR-Code-Generator](#)
- [GoQR](#)
- [QR Stuff](#)

# TEMPLATES

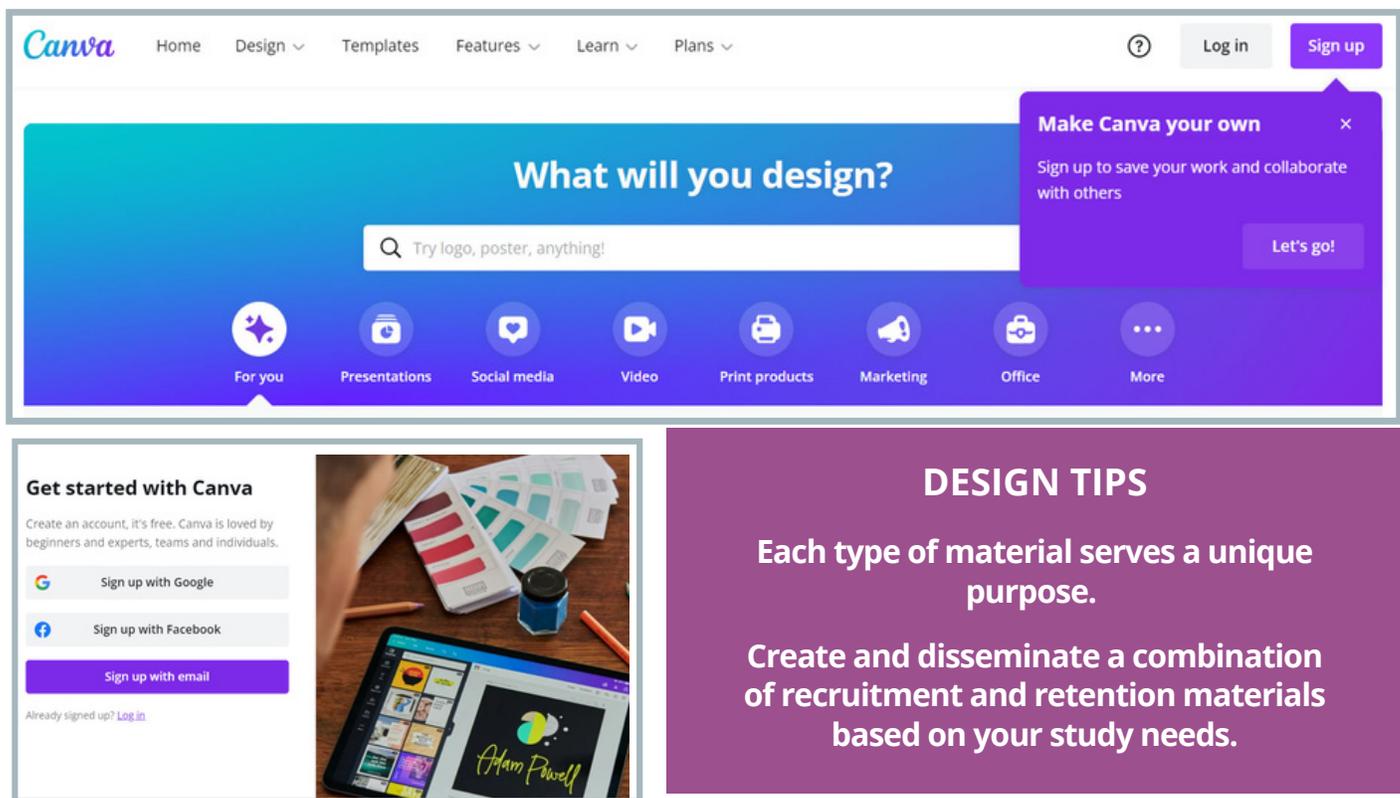
At the RIC, we've worked with several studies and **developed a suite of easy-to-use design templates** for study teams to jumpstart the process.

**Each template was created in Canva, a free graphic design platform** used to create social media posts, presentations, posters, and other visual content.

## How to access RIC materials templates

### Create an Account

In order to access these, you'll first need to create a free account with [Canva](#).



The image shows a screenshot of the Canva website homepage. The top navigation bar includes links for Home, Design, Templates, Features, Learn, and Plans, along with a search icon, a Log in button, and a Sign up button. The main content area features a large blue banner with the text "What will you design?" and a search bar. Below the banner are several category icons: For you, Presentations, Social media, Video, Print products, Marketing, Office, and More. A purple pop-up box on the right side of the banner says "Make Canva your own" and "Sign up to save your work and collaborate with others" with a "Let's go!" button. Below the banner is a "Get started with Canva" section with a sign-up form. The form includes the text "Create an account, it's free. Canva is loved by beginners and experts, teams and individuals." and three sign-up options: "Sign up with Google", "Sign up with Facebook", and "Sign up with email". There is also a "Log in" link for "Already signed up?". To the right of the sign-up form is an image of a hand holding a color palette and a tablet displaying a design. To the right of the sign-up form is a purple box with the text "DESIGN TIPS" and "Each type of material serves a unique purpose. Create and disseminate a combination of recruitment and retention materials based on your study needs."

You can sign up with Facebook, Google or email. If you opt for Facebook or Google, you'll need to authorize access.

If you choose email, you'll need to put in your name, your email address and choose a password.

Canva sends an email to you to confirm your account. Go to your email, click "confirm my account" and you'll be redirected to your new Canva account.

Once you've created your account, you will be able to access and download the brochures, flyers, posters, info sheets, flipcharts, cards, and newsletters designed and shared by RIC to your account for customizing. You can also use your account to create materials outside of using the RIC-developed materials. We have provided video resources in the Canva 101 section for a beginner's guide to getting started with Canva.

# TEMPLATES

## Direct links to templates:

The following pages contain **direct links to brochures, flyers, posters, info sheets, flipcharts, cards, and newsletters designed and shared by RIC**. There are materials tailored to two different audiences - **research participants** (recruitment and retention) **and clinicians** (promote study for referrals).

When deciding to use these templates, **please remember that you will replace the template text and images to customize for your study**. Please refer to the Messaging and Design Best Practices section of this toolkit for more information on developing your materials.

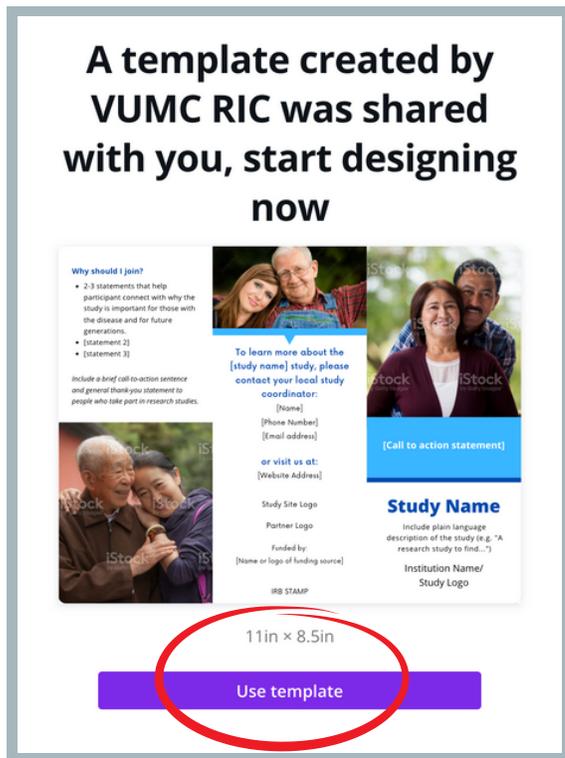
How to use a template provided in this toolkit:

First, scan through the following pages for information and a preview of the provided templates. Some templates include more than one version of the design.

If you wish to **use the template, click on the teal button:**

Use This Template

You will now see a screen similar to this:



Click the purple 'Use template' button to add the template to your Canva account.

You should now see the template in your Canva account and can begin customizing.

Refer to the Canva 101 guide in this toolkit for more information on how to use Canva.

Our templates include watermarked versions of the types of images you could include, depending on your study.

The example images we used are available for purchase from [iStock](#) or [Adobe Stock](#).

# TEMPLATES

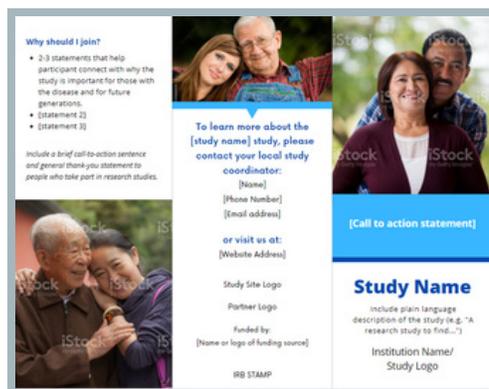
## Participant Recruitment Materials

### Brochures

#### Participant Brochure V1

- Tri-fold brochure for research study promotion & participant recruitment
- Includes spaces for 4 images

[Use This Template](#)



#### Participant Brochure V2

- Tri-fold brochure for research study promotion & participant recruitment
- Includes spaces for 4 images

[Use This Template](#)



#### Participant Brochure V3

- Tri-fold brochure for research study promotion & participant recruitment
- Includes spaces for 3 images

[Use This Template](#)



#### DESIGN TIP

Create and vet your study brochure first, since it is the most comprehensive document. Then create other recruitment materials based on its content.

# TEMPLATES

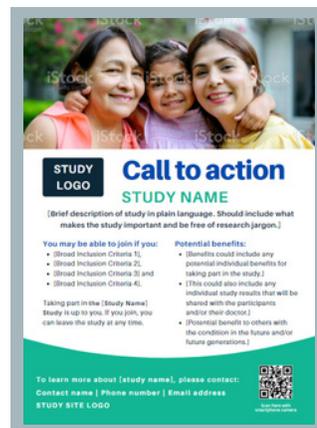
## Participant Recruitment Materials

### Flyer

#### Participant Flyer

- Flyer for research study promotion & participant recruitment
- Includes 3 different flyer templates
- Each template includes a space for 1 image

[Use This Template](#)



### Poster

#### Participant Poster (18"x24")

- Flyer for research study promotion & participant recruitment
- Includes 3 different poster templates
- Each template includes a space for 1 image

[Use This Template](#)



### TIPS

Flyers & posters should include a message that can be communicated quickly.

Display in high traffic areas or common areas where people will come into close contact with them.

# TEMPLATES

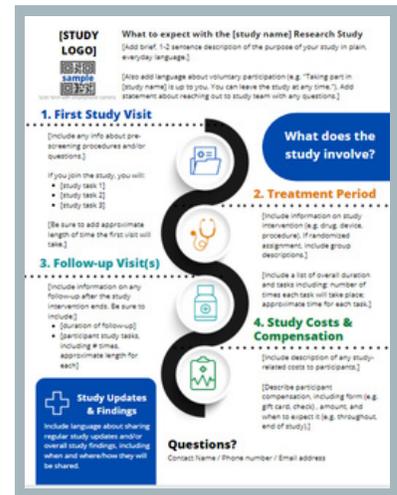
## Participant Recruitment Materials

### Study Info Sheet

#### Participant Study Info Sheet

- Summary sheet to inform potential participants what to expect a study
- Dual purpose - can be used as an aid during consent & also for additional information about study expectations

[Use This Template](#)



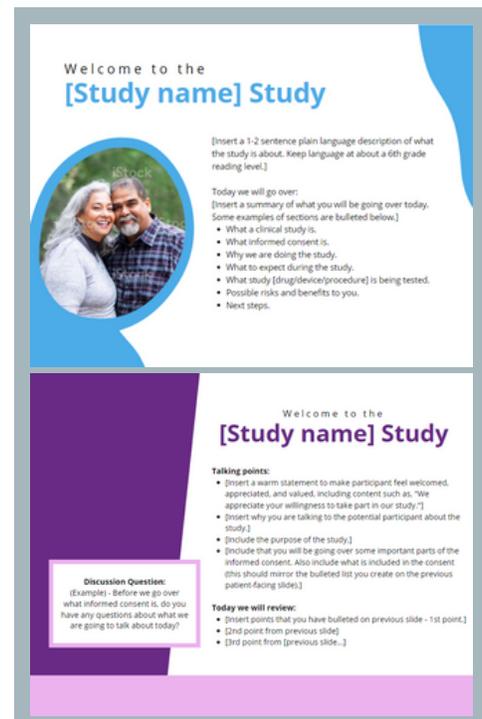
### Flipchart/eBook

#### Flipchart/eBook

- Flip-chart/eBook provides volunteers a detailed description of a research study
- Dual purpose - can be used to introduce the study before consent or as a consent-guide during consent
- Can be used in print format as a flipchart or digitally as a presentation
- Includes 12 pairs of slides - **participant-facing slides in blue**; **researcher-facing slides in purple**

[Print Format Template](#)

[Presentation Template](#)



# TEMPLATES

## Participant Retention Materials

### Thank You & Birthday Cards

#### Thank You Cards

- Cards acknowledging and thanking volunteers for their participation
- Includes 5 different card templates

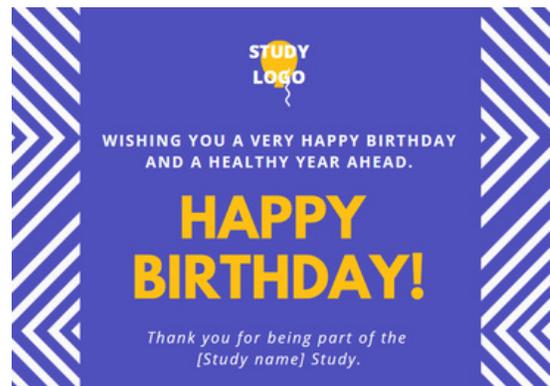
[Use This Template](#)



#### Birthday Cards

- Cards for wishing participants a happy birthday
- Includes 3 different card templates

[Use This Template](#)



#### TIPS

Sending Thank You & Birthday Cards is essential in returning value to participants.

Personalize your retention materials by including the participant's name and a handwritten note.

# TEMPLATES

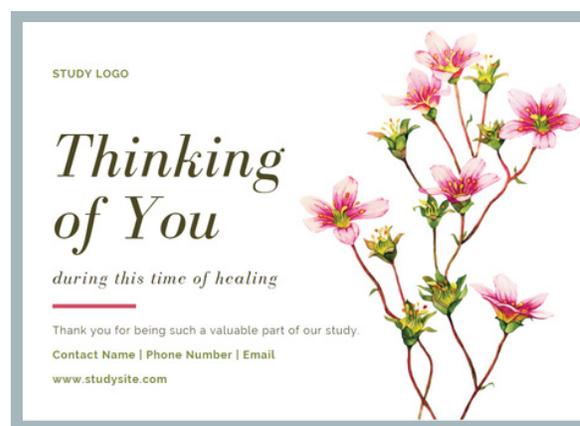
## Participant Retention Materials

### Thinking of You & Holiday Cards

#### Thinking of You Cards

- Templates for participant get well soon and sympathy cards
- Includes 3 different card templates

[Use This Template](#)



#### Holiday Cards

- Inclusive cards for wishing participants a happy holiday season
- Includes 2 different card templates

[Use This Template](#)



### CONTENT & DESIGN TIP

Be sure your cards include messaging and colors that are inclusive of a variety of cultures and beliefs.

# TEMPLATES

## Participant Retention Materials

### Newsletters

#### Participant Newsletter, Version 1

- Newsletter for thanking, informing, and engaging volunteers
- Includes spaces for 4 images
- Page count: 4

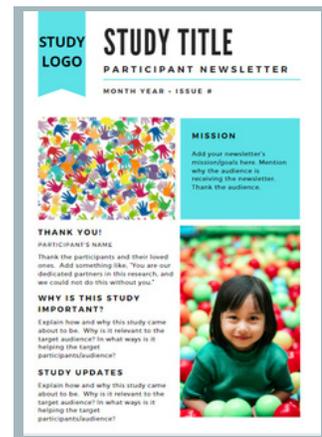
[Use This Template](#)



#### Participant Newsletter, Version 2

- Newsletter for thanking, informing, and engaging volunteers
- Includes spaces for 7 images
- Page count: 4

[Use This Template](#)



### CONTENT TIPS

Consider including plain-language descriptions of the study, as well as study updates.

Also include information that may be of value to your participants (e.g. participant stories, updates on the condition being studied, resources, recipes).

# TEMPLATES

## Materials for Clinician Awareness/Study Referrals

### Flyer

#### Clinician Flyer

- Flyer for research study promotion to clinicians and participant referrals
- Includes 2 different flyer templates
- Each template includes a space for 1 image

[Use This Template](#)



### Poster

#### Clinician Poster

- Poster for research study promotion to clinicians and participant referrals
- Includes 2 different poster templates
- Each template includes a space for 1 image

[Use This Template](#)



### CONTENT & DESIGN TIP

All materials you create for clinician awareness need to be succinct. Be sure to use bullets, bolding, and color to make the document easy to read and digest quickly.

# TEMPLATES

## Materials for Clinician Awareness/Study Referrals

### Study Info Sheet

#### Clinician Study Info Sheet

- Information sheet that informs practices/providers what they and their patients can expect if they participate in your study.

[Use This Template](#)

**STUDY LOGO** Brief description of what study acronym stands for

[Study Name] Project Invitation  
[Practitioner name] invites you to participate in a study called [insert name]. List a brief description of what the study entails (study goals).

**Why is this study important?**  
[Insert disease/condition name] affects [list who it affects and why]. How will the study be helpful to both participants and clinicians? Briefly list any benefits for participants and clinicians.

**What will I be asked to do?**  
(1) List any activities that clinicians will have to be involved in.  
(2) This includes involving study to patients, as well as any additional tasks.

**Which patients are eligible to participate?**

<b>Inclusion criteria:</b> <ul style="list-style-type: none"><li>• [criteria 1]</li><li>• [criteria 2]</li><li>• [criteria 3]</li><li>• [criteria 4]</li></ul>	<b>Exclusion criteria:</b> <ul style="list-style-type: none"><li>• [criteria 1]</li><li>• [criteria 2]</li><li>• [criteria 3]</li><li>• [criteria 4]</li></ul>
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**What will my patients be asked to do?**

- [Duration of study for participants]
- [Randomization to how many groups]
- [Study activities]
  - [Activity 1]
  - [Activity 2]
  - [Activity 3]

[Comment on measures that have been taken to make study convenient to participants / any approved medicines or treatments provided at no cost / any compensation to participants]

**Who should I contact for more information?**  
[Study Contact Name] • [Institution] • [email] • [phone]

Study Investigators: [Insert 1, Institution 1] • [Insert 2, Institution 2]  
[Study name] is being conducted by the following partners:  
[Address - Institution Name]

#### TIP

Consider sending a clinician study info sheet along with a personalized letter to invite referring clinicians to participate in your study.

# CANVA 101

## How to use Canva

**Canva is an online, graphic design platform** used to create social media graphics, presentations, posters, documents, and other visual content. It's **free to use** and offers paid subscriptions such as Canva Pro and Canva for Enterprise for additional functionality.

### Video Tutorials

In this section, we'll provide **video tutorials** and **instructions for getting started with and utilizing Canva for your study materials**. You'll learn how to use Canva for beginners. If you're just getting started, this easy tutorial will guide you step by step on getting started as a complete beginner of Canva.



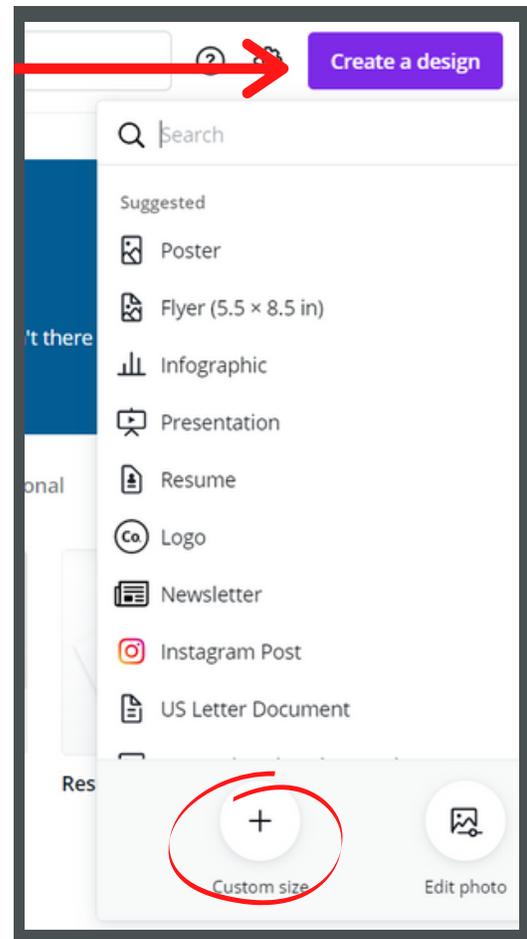
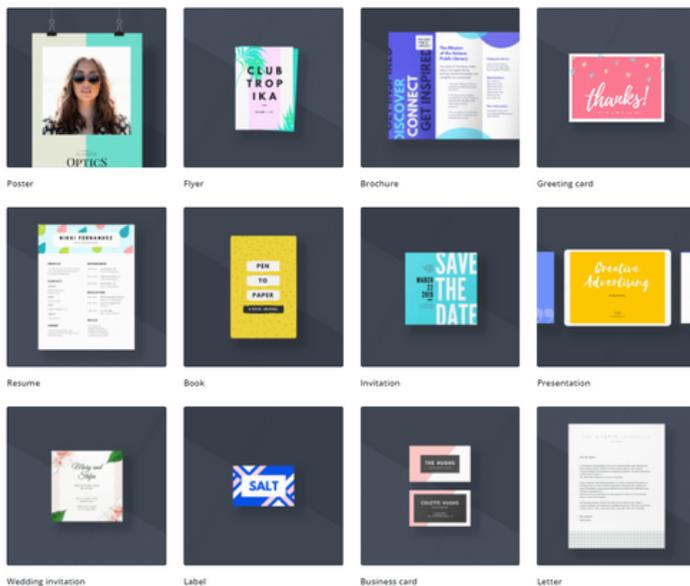
There are **many other videos** available on YouTube to cover any additional needs not covered here:

- 0:00 Lesson 1 - Introduction and What You'll Learn
- 0:41 Lesson 2 - Sign Up for a Canva Account
- 0:52 Lesson 3 - Understanding the Canva Homepage
- 3:00 Lesson 4 - Canva Homepage Top Navigation Bar Explained
- 3:38 Lesson 5 - How to Create a New Canva Design (3 Ways)
- 5:30 Lesson 6 - Caveat: Paid Elements and Images Explained
- 6:30 Lesson 7 - Finding Your Way Around the Canva Editor/Interface
- 9:02 Lesson 8 - How to Start Editing on Canva
- 10:09 Lesson 9 - Canva vs. Photoshop: What Canva Can't Do
- 11:58 Lesson 10 - Editing Canva Elements
- 13:13 Lesson 11 - How to Add Stock Photos/Images
- 14:35 Lesson 12 - How to Add Canva Elements
- 15:24 Lesson 13 - Working with Canva Layers
- 16:35 Lesson 14 - The Easiest Way to Add Text to Your Design
- 17:37 Lesson 15 - How to Use Photo Effects, Filters and Adjustments
- 18:43 Lesson 16 - How to Add More Pages in the Same Design/Project
- 19:45 Lesson 17 - How to Download Your Canva Design
- 20:15 Lesson 18 - Canva vs. Canva Pro Plans: What Are the Differences?
- 21:15 Lesson 19 - Final Words/Summary
- 21:40 Lesson 20 - Next Steps to Mastering Canva

# CANVA 101

## Design size guide

Canva makes it easy to get the appropriate dimensions right for your designs. Based on what type of material you are designing, Canva most likely has a pre-set design template ready for you to start using.



### DESIGN TIP

You can use existing dimensions that Canva provides, or create your own custom dimensions.

### ADDITIONAL READING

[Canva Design Size Guide](#)

# CANVA 101

## Upload your own images

In this video, learn how to upload an image and video. Canva also has thousands of free images that you can also select from!



## Design a logo

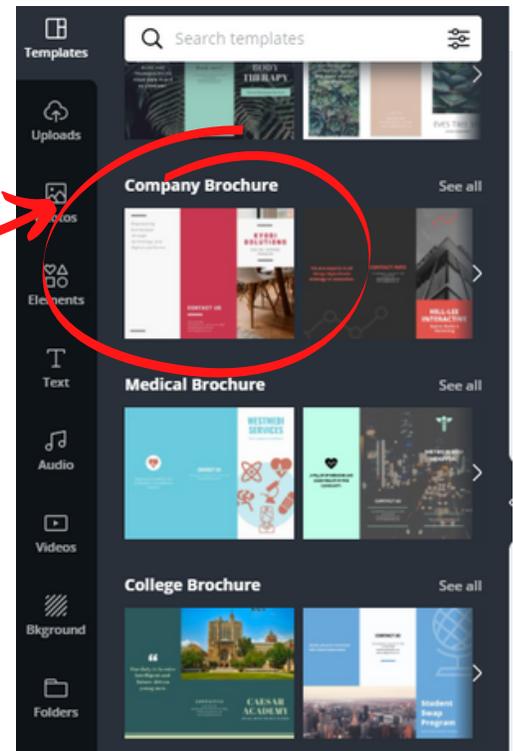
In this Canva Tutorial, you'll learn how to make a logo for free.



# CANVA 101

## Create a trifold brochure

In this video, you'll be guided on how to make a trifold brochure. Learn how to create your own design or edit an existing template with your choice of text and images.



### BROCHURE PURPOSE

A brochure acts as a detailed reference of the “who, what, when, where, why, and how” of the study.

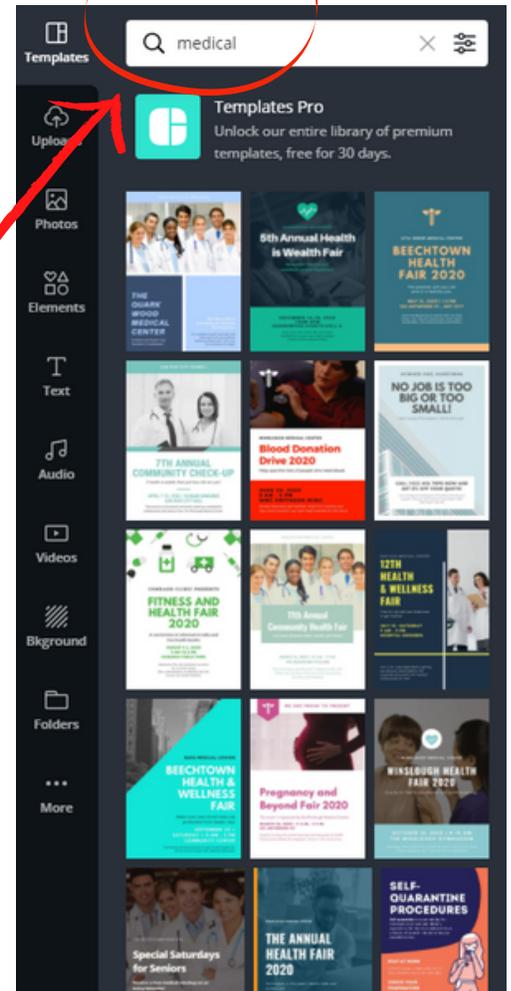
### TIP

Although the CANVA platform underlines misspelled words in red, it does NOT have a spell-check feature. Consider using another program (Safari, Firefox, Word) that has tools for checking spelling and grammar.

# CANVA 101

## Create a flyer/poster

A demo/walk through of how to create professional looking flyers/posters. Create your own design or choose from countless existing designs. You can search for "healthcare", "medical" in the "Search Templates" bar for specific designs.



### FLYER / POSTER PURPOSE

A flyer or poster is usually a single, unfolded printed sheet that is used to draw attention to an event, service, product or idea. A flyer usually contains a very simple message that can be conveyed quickly.

# CANVA 101

## Create a newsletter

Watch this video to learn how to design a newsletter and send electronically.



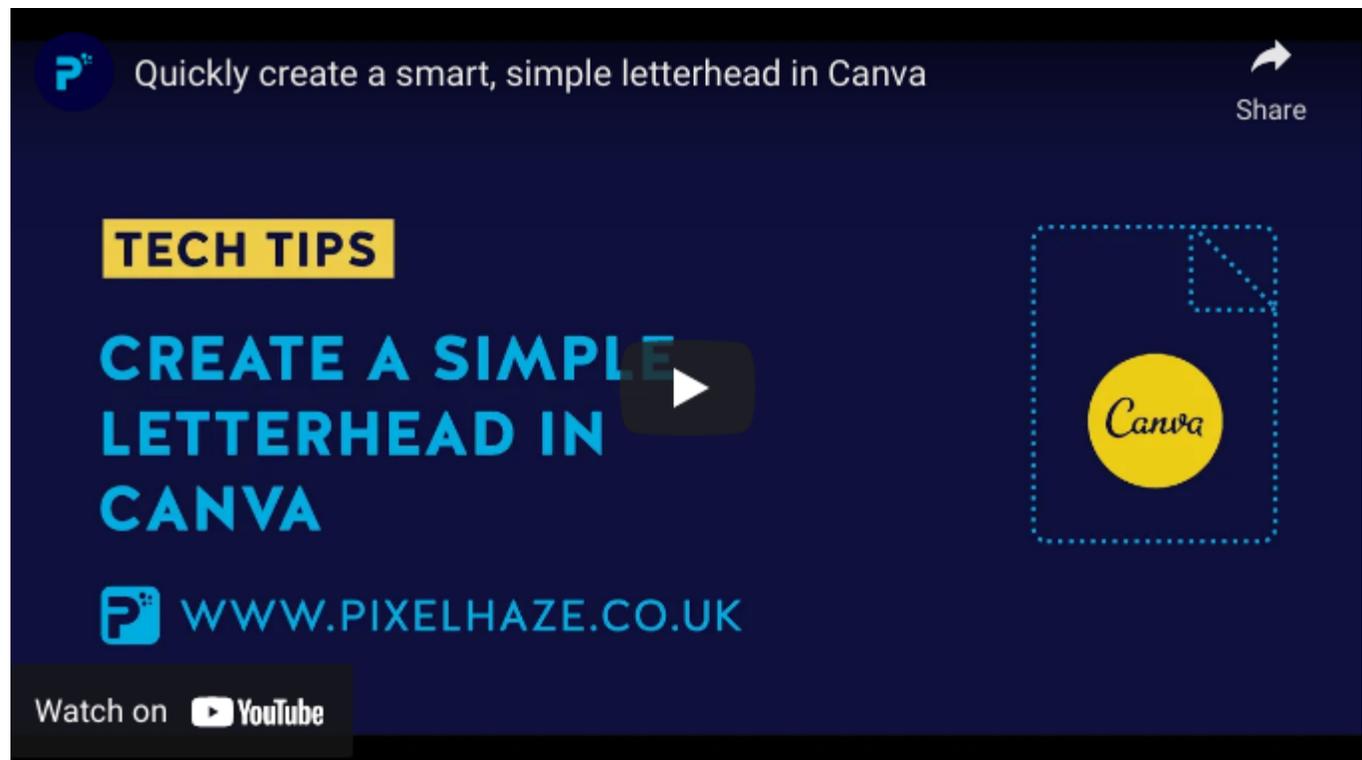
### NEWSLETTER PURPOSE

A newsletter is a tool used by organizations to share relevant and valuable information with their network of stakeholders. Newsletters give you direct access to your audience's inbox, allowing you to share engaging and valuable content with participants and clinicians.

# CANVA 101

## Create a letterhead

This 7-minute guide will take you through all the main steps required for creating a letterhead in Canva.



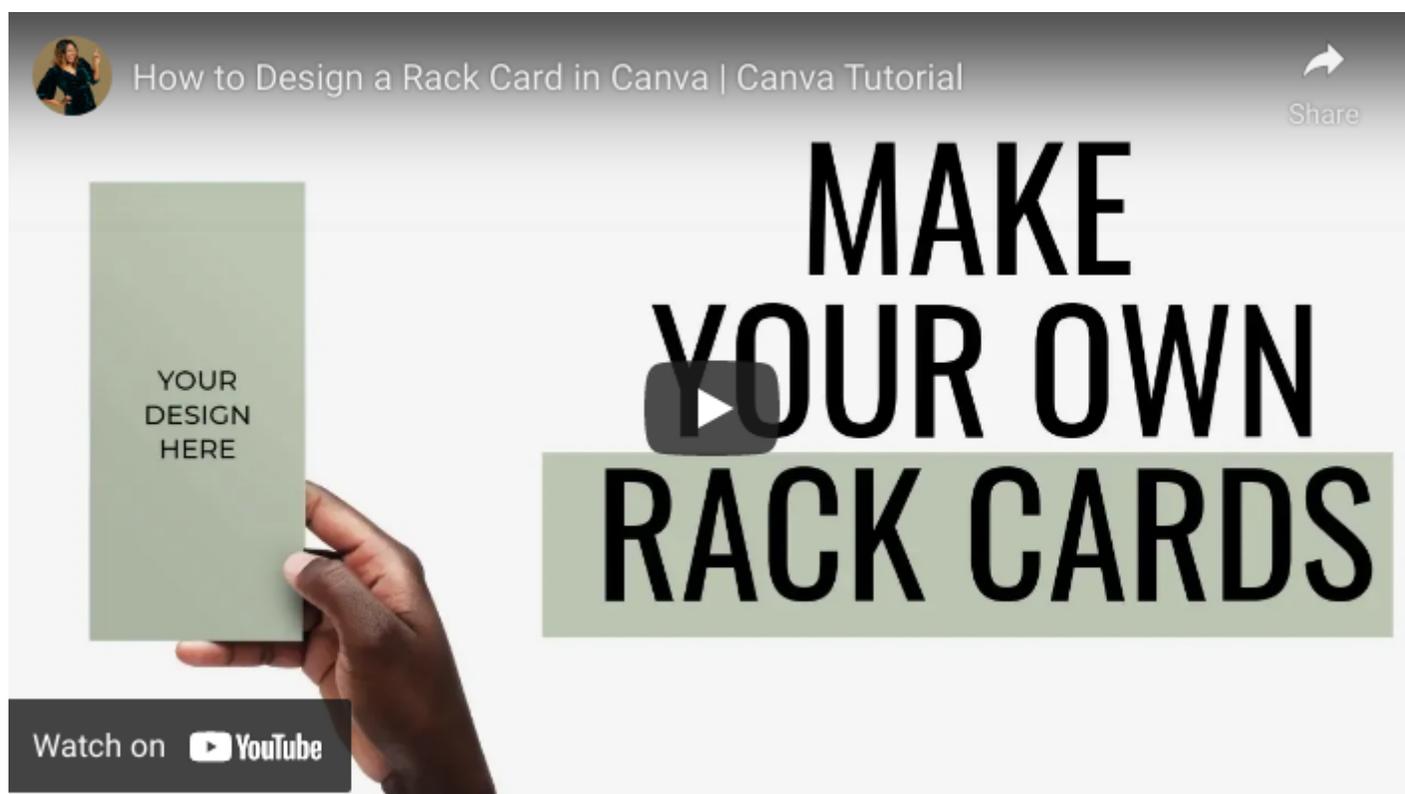
### LETTERHEAD PURPOSE

The purpose of a letterhead is for your branding to be recognizable across all of your study communications.

# CANVA 101

## Create thank you, birthday & holiday cards

In this video, you'll be guided on how to make a trifold brochure. Learn how to create your own design or edit an existing template with your choice of text and images.



### PURPOSE FOR USING CARDS

Thank you, birthday, and holiday cards are a reflection of your sentiment and appreciation for someone, whether it be expressing gratitude for a specific act or well wishes during holidays or birthdays.

This is an excellent way to show participants how important they are by communicating your appreciation for their time and participation.

# CANVA 101

## Create a flipchart/eBook

Watch this step-by-step video to learn how to design a flipchart/eBook.



### FLIPCHART / EBOOK PURPOSE

Flipcharts can be used to explain a topic, have a question-and-answer session or allow for real-time feedback. The aim of eBooks, meanwhile, is to simplify and enhance the overall learning experience.

# CANVA 101

## Create social media ads

In this video, take a look at how to use Canva to create social media post images. Adding images to your social media posts can provide more click-throughs, engagements and ways of interacting with your audience. Well-designed graphics are essential for social media success. Easily create professional looking designs for any social media platform.



### SOCIAL MEDIA PURPOSE

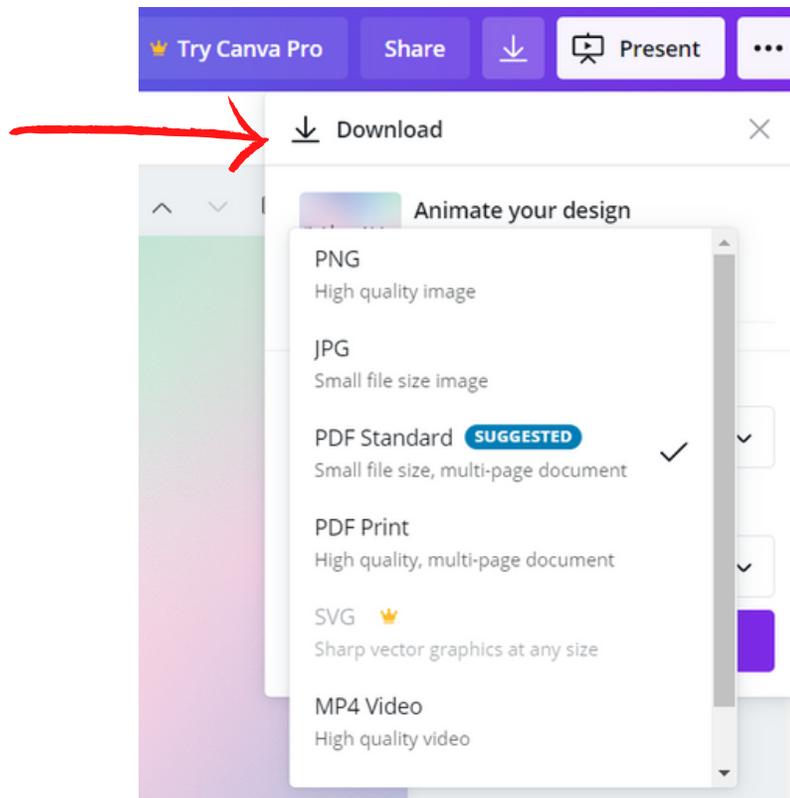
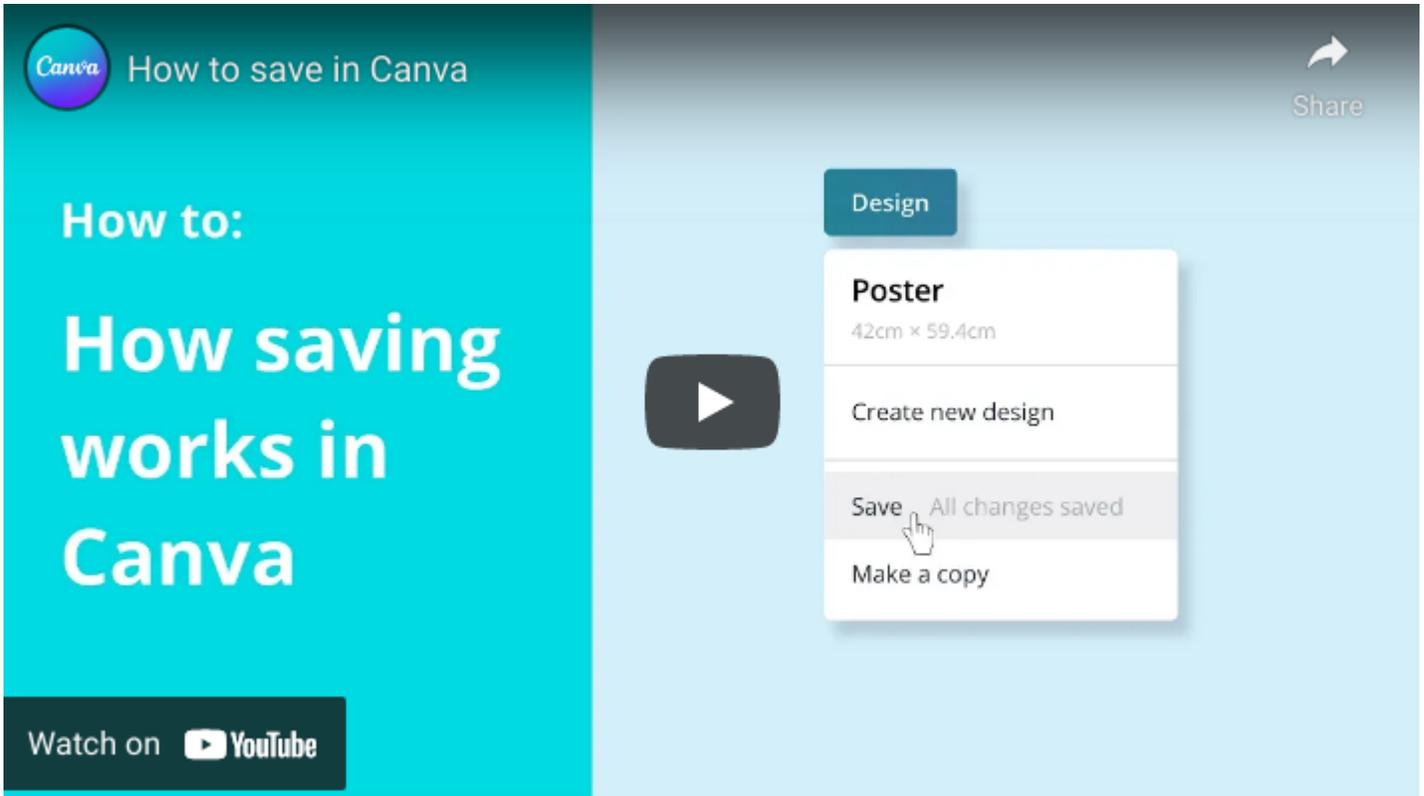
Social media builds awareness and is effective at driving engagement and conversions.

### DESIGN TIP

Creating social media ads in Canva is simple. Canva has all of the social media channels' dimensions set, so no need to figure out what dimensions you would need!

# CANVA 101

## Save and download your design

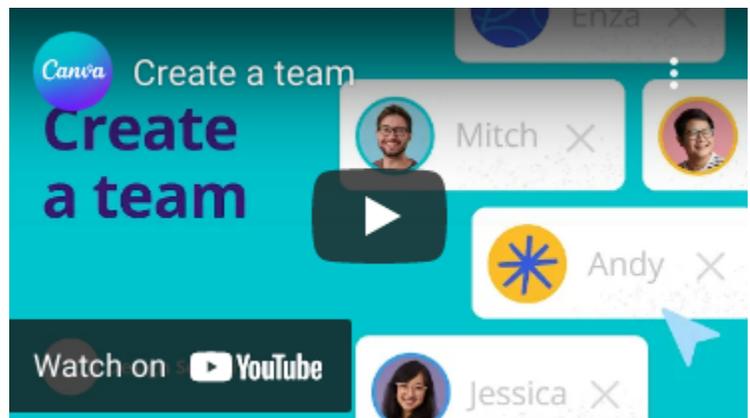


# CANVA 101

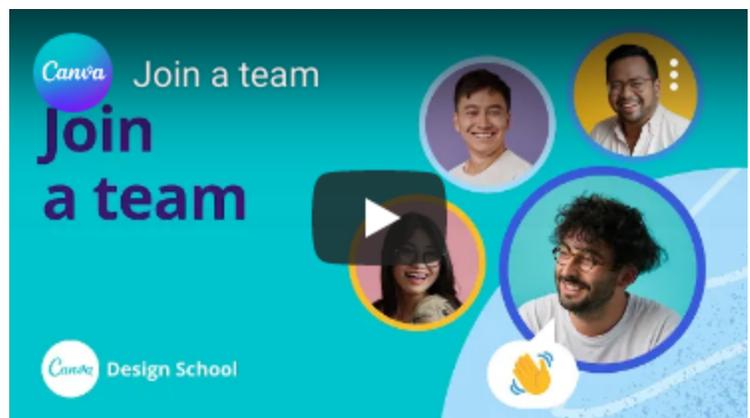
## Set up a team

Canva offers the ability to collaborate with a team on your designs. Below is included a quick overview of how to create a team, join a team, and manage permissions within a team.

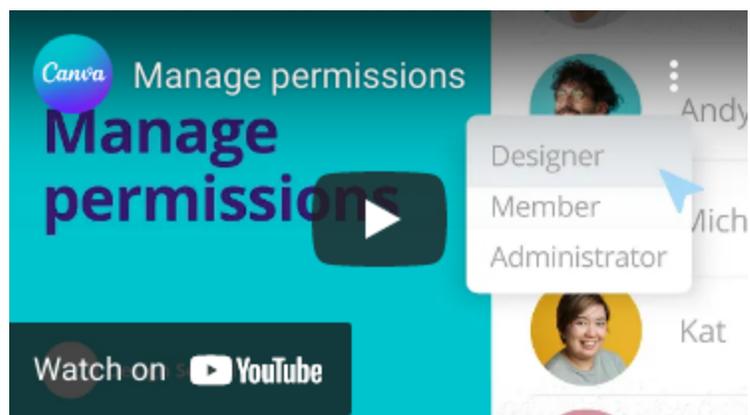
### Create a team



### Join a team



### Manage permissions



# ACKNOWLEDGEMENTS

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