

ECHO for Clinical Research Professionals (CRP) – Summary of (i) Key presentation and (ii) Problem discussion from session held on 24 Oct 2025

(i) KEY PRESENTATION:

Patients into participants: Consenting strategies to improve clinical trial recruitment by Max Lounsbury, RN, BScN, MHS, CCRP, PMP (*Slide deck attached*).

Max's presentation had three main objectives: to learn how to assess a patient's knowledge prior to consenting, to develop a personalized approach to consent discussions, and to implement communication strategies to uncover recruitment barriers.

He categorized patients into three groups:

- The "yes" patients are those who immediately want to participate, often saying "where do I sign?" before introductions, typically having high medical literacy or perhaps a healthcare background.
- The "no" patients typically want only standard treatment, cannot travel easily, or have other non-modifiable commitments that prevent participation.
- The "maybe" patients are those we can focus on and put our energy towards because they have modifiable barriers or stigma about clinical research that can be addressed during consent discussions.

Before discussing the clinical trial, Max recommends doing the following preparatory steps:

- Firstly, understanding what patients know about their disease and condition to gauge medical literacy, also try to use the exact terms they use e.g. if they say they take a "blue pill for heart condition", use their terminology.
- Secondly, determine if patients are ready to learn by checking if they are emotional, distracted, or have support persons present. Discuss any major concerns and invite them to share personal details about hobbies, work, and interests. This information can be woven throughout consent discussions to show that we listen and we care, while helping patients visualize their life on the clinical trial.
- Thirdly, ask what patients already know about the clinical trial to fill knowledge gaps appropriately.

Other tips included setting clear expectations about screening periods and decision timelines, addressing stigma directly when patients mention being "guinea pigs," adding context to safety questions by explaining trial phases, and treating consent as a discussion rather than presentation by regularly checking understanding and encouraging questions throughout the process.

(ii) PROBLEM DISCUSSION:

Across Canada, how have you as a CRP grown through formal training programs? What certifications (including those with formal designations) are you aware of? What are the opportunities and challenges in pursuing these certifications?

ECHO community members contributed their experiences and ideas as follows.

How some community members have grown through training:

- Some did college or university certificates (Humber, McMaster, Seneca, Webster).
- A few completed graduate programs or ACRP courses.
- Many said they learned on the job or through mentorship and project work.
- Some joined SOCRA or ACRP webinars to keep learning.
- A few took PMP or Lean Six Sigma training to boost leadership and management skills.

Certifications community members mentioned:

- SOCRA CCRP – common but pricey and very U.S.-focused.
- ACRP certifications – helpful but also costly.
- PMP – good for moving into management; needs 35 hours of PM training.
- Lean Six Sigma (Green/Black Belt) – useful for process improvement.
- CQA – for quality assurance work.
- Canadian-specific certification – coming soon through the new Canada's Clinical Research Workforce Strategy (<https://www.flipsnack.com/85A8DA5569B/canada-s-national-strategy-to-advance-the-clinical-research/full-view.html>).
- College programs (Humber, Seneca, McMaster, Webster).
- Mention of Decision Support Framework and N2 online training as resources.

Challenges:

- High costs and time to complete and maintain certifications.
- Many programs are U.S.-based, not tailored to Canadian rules.
- Hard to find Canadian mentors or clear guidance on which ones matter most i.e. there's no clear guidance on which credentials (like SOCRA, ACRP, PMP, etc.) are most recognized or useful for career growth.
- Limited employer funding or support.
- Most college certificates are intro-level and not widely recognized.
- Travel and conference requirements for renewal (to keep certification alive) can be expensive.

Opportunities:

- Helps with career growth and professional credibility.
- Builds transferable skills for leadership and project management.
- Some free or low-cost options (like UHN's PMP prep through Precipio).
- The new Canadian workforce strategy could bring better national standards.