



COLLABORATIVE OF
**GENDER & SEXUAL
HEALTH EQUITY**

RESEARCH EDUCATION RESOURCES


Gender & Sex in Methods & Measurement

Research Equity Toolkit

Tool #2: Effective Recruitment Strategies



THE UNIVERSITY
OF BRITISH COLUMBIA



Once we have determined who will be eligible for our research studies, we need to develop a recruitment strategy – a clear plan for identifying and reaching prospective participants, providing them with information about the study, and enrolling them into it. This tool will explore considerations to take into account when recruiting people who are marginalized and minoritized based on their genders, sexes, and sexualities.

Clear & precise communication

The words we use and images we choose to feature in recruitment materials will signal who is eligible for our research studies. For example, a study about menstruation and participation in sports that frames eligibility as limited to “women who have participated in recreational or professional sports in the last five years” is unlikely to reach and recruit trans and nonbinary menstruators who were assigned female at birth, but may be effective for recruiting trans women, some of whom may also have hormonal cycles without menstrual bleeding. Or, a study that is concerned with the sexual practices of new parents, which features only images of two-person couples who are likely to be read as cisgender and heterosexual, will neither effectively reach nor enrol parents in multi-parent families, or who are gay, lesbian, trans, nonbinary, etc. Check out [Tool #1](#) for more guidance on how to determine and communicate eligibility criteria in inclusive ways.

Balancing research fatigue with research benefit

People who are marginalized based on gender/sex/sexuality are systematically erased from research, which has negative impacts. However, people marginalized on these bases are also overstudied, which also has negative impacts. Participating in research involves cognitive effort and, frequently, emotional effort as well. This is especially the case with research that engages with experiences of oppression and/or with marginalized social locations, which can be difficult to disclose, talk about or which may even be retraumatizing. Sometimes marginalized and minoritized people are targeted by many studies and asked the same questions repeatedly. It is important to balance the potential for research fatigue while recruiting from potentially oversampled pools (which can impact participants’ wellbeing and data quality) against both the potential benefits of conducting a study (which can benefit communities and research foundations) and potential harms (for example, where a study is conducted as a result of academic intrigue and curiosity rather due to its resonance with communities of interest, or which has the potential to perpetuate harms and inequities).

Yet, we have a responsibility to ensure that our research is meaningfully inclusive and to prioritize research that can be mobilized into actionable change, including social justice in knowledge frameworks, while at the same time recognizing that participating in research is burdensome.

Clarity about the level of community engagement, as well as planned integration of knowledge translation, may help prospective participants assess whether they are willing to take on the burden of research participation. Research consent forms sometimes include vague references to potential benefits to participating in a study. Marginalized and minoritized people may be more likely to participate in a research study if researchers share their specific plans for disseminating the findings in ways that may benefit the participant directly, and/or benefit others who identify in similar ways as they do. Although there are undoubtedly far-reaching impacts of academic dissemination, such as peer reviewed articles and conference presentations, marginalized and minoritized prospective participants may be dissatisfied with a dissemination strategy that focuses exclusively on these to the exclusion of other approaches.

In addition to academic dissemination, recruitment materials could detail that the research findings will be:

1. Shared with participants, in a short, plain language summary.
2. Distilled into law, practice, and policy guidelines or suggestions.
3. Used to find evidence-based solutions to a problem.
4. Used to design and evaluate the effectiveness of an intervention.
5. Helpful in raising awareness of an issue among key stakeholders or community partners.
6. Helpful in addressing hermeneutical or epistemic injustices, or the injustice of knowledge frameworks
7. Written or talked about in news or social media.



Compensation

Researchers should provide compensation to participants whenever possible, not just for their time and effort, but as acknowledgment of the value of their contributions. Reimbursement for expenses incurred as part of participation is also important, including for transportation costs, childcare, meals, lost salary, etc.

Unrestricted compensation

Offering gift cards that can only be used in certain stores may disincentivize participation, due to the limits that this places on their use. Consider offering cash or pre-paid credit cards that participants can use without restriction. This is especially important for prospective participants who may be experiencing precarity in housing, education, employment and food security.

Further, prospective participants may have ethical concerns about participating in a study where compensation is a gift card from a company that violates established human and worker rights and laws, or is otherwise controversial for any number of reasons. Although increasingly commonplace, avoid gift cards from multinational distributors like Amazon whenever possible, due to ongoing concerns about worker exploitation, workplace safety, and Amazon's spotlighting of anti-trans and other discriminatory content.

There may be logistical, financial, and regulatory factors that impact both researchers' ability to compensate participants and the methods of compensation that are available. With these in mind, it is nevertheless recommended that researchers make thoughtful and deliberate choices about compensation, recognizing that prospective research participants may consider not only *whether* they will be compensated, but *how* they will be compensated, when deciding whether to enrol in a study.

Differential compensation

Differential compensation is where some research participants are paid more than others within the same study. This is justified when some participants commit more time, have greater barriers to participation, and/or are a harder-to-reach group than others. For example, in a study of men, transmasculine and nonbinary people's experiences of pregnancy loss, Riggs et al. (2020) compensated participants of colour at higher rates than white participants, due to the "targeted aims for the study and to

reflect structural constraints to participation (e.g., U.S. history of racist research exploitation and increased requests for participation) faced by participants of color” (p. 2). Where there are concerns about recruiting insufficient numbers of intersex, trans, nonbinary, and/or Two-Spirit people among others, differential compensation may further incentivize participation from these individuals who may be otherwise reluctant to step forward.

Differential compensation can also communicate how researchers are valuing the contributions of, and acknowledging the barriers to involvement by, participants according to social location and related oppression. Further, there are social and financial costs to being a person who is marginalized and minoritized based on gender, sex or sexuality; while differential compensation cannot remedy structural inequalities, it can signal to prospective participants that researchers are aware of these inequalities and are compensating participation accordingly.

Managing inclusive recruitment online advocacy

Social media are frequently cited as effective tools for recruiting marginalized and otherwise hard-to-reach populations. But the use of social media comes with associated risks, including the potential for participants and the research team to be exposed to negative comments. When using social media and other online platforms to recruit a diversity of research participants, be prepared to moderate the comments section, with a pre-established safety and monitoring guideline. Such a guideline could stipulate, for example, whether comments will be turned on or off, how often the moderator will check comments, and that all comments that could be characterized as discriminatory will be promptly removed by research team members serving as moderators and/or using blocked-word filters available on platforms such as Facebook. Guidelines could also provide moderators with suggestions for how to reply to good faith queries about a study’s eligibility criteria, even when worded in ways that challenge the study. A detailed guideline may minimize risk and harm, and will communicate to prospective participants that their safety is paramount even prior to their being officially recruited to the study.

Remember that relying solely on social media or other online recruitment strategies that require digital literacy skills and access to technology will ultimately result in participant samples who are younger, have access to the Internet and devices needed to access the Internet, and are familiar with social media platforms.



Building relationships

Another strategy for recruiting participants who are marginalized and minoritized based on their genders, sexes and sexualities is to have relevant community organizations circulate recruitment materials.

This would involve identifying local, regional, provincial or national organizations that serve or advocate for the participants we are trying to recruit and having them assist by sharing recruitment materials on their websites, listservs, social media platforms, newsletters, etc. This strategy is most successful when researchers have built mutually beneficial relationships with these organizations, rather than contacting them at recruitment time and using them as tools for the dissemination of recruitment materials alone.

Here are some strategies for building relationships with community organizations:

1. Have research team members commit to a certain number of hours of volunteering with an organization, as an act of service. This provides an opportunity for researchers to get to know an organization, and its needs. Ensure you consider how these volunteers will be compensated by your team.
2. Have research team members provide a certain number of hours of pro-bono consultation services to a community organization (e.g., assistance with grant writing, analyzing findings from a client survey, assistance planning an event, conducting a staff training on research design). This might be especially appropriate to those who are senior or on a salary of some kind.
3. Have research team members offer to deliver presentations, create infographics, write plain language summaries and reports and other materials that can be shared with a community organization after research has been conducted.

Community organizations may have more to offer researchers than access to their client or patient-bases. For example, a community-based approach could allow organizations and their clients or patients the opportunity to help shape research questions around community needs, foster trust among prospective participants who may for good reason be distrustful of researchers, and provide a mechanism for sharing or returning data and findings to communities and translate them into action. Where community organizations may become research partners, having preestablished, mutually beneficial relationships will positively impact future collaboration.

Recruiting Indigenous participants

Relationship building, compensation, research fatigue, research benefit and inclusive recruitment strategies are all paramount considerations when recruiting First Nations, Métis and/or Inuit participants, especially Two-Spirit and Indigiqueer participants. Two-Spirit and Indigiqueer people are underrepresented in Indigenous-centered research, in queer/trans-centered research, and in all other forms of research where Indigeneity, gender and/or sexuality are not central to the design. Given the history and present of scientific mistreatment of Indigenous people and communities, and values within many Indigenous nations, Indigenous participants may rightly have more skepticism about academic research, and place a high value on honesty, reciprocity and respect, and use these values to assist in their decision-making about whether to participate in research studies (Guillemin, et al., 2016).

Recruiting Two-Spirit and Indigiqueer participants will involve identifying and connecting with key individuals and organizations, which may include the local Nation, provincial or regional Two-Spirit organizations, as well as Elders and Knowledge Keepers. Making these connections early in a research project will ensure that research is conducted in ways that attend to Indigenous ways of knowing and being, which is paramount to soliciting the participation of Two-Spirit, Indigiqueer and other Indigenous people.

Familiarize yourself with [OCAP](#), the First Nations principles of ownership, control, access and possession, and remember that it is First Nations who can determine whether any given research study is OCAP-compliant. At the same time, thinking critically and being transparent about who owns, controls, can access and ultimately possesses data can help in establishing and maintaining trust with Indigenous participants, including Two-Spirit and Indigiqueer participants.



Intersectionality & recruitment

Even if you are successful in identifying and enrolling participants who are marginalized and minoritized based on their genders, sexes and sexualities to your study, you may find that these participants are homogenous in other ways.

Example 1

You may find that you can effectively recruit white participants, but struggle to recruit participants who are Black, Indigenous, or people of colour. Not only is it important to decentre whiteness in research but having a predominately white sample would mean that you could neither effectively examine the relationships between gender, sexuality and racialization, nor would your findings, interventions, recommendations or conclusions be applicable to communities of colour.

Example 2

You may find that you can effectively recruit trans and nonbinary people who were assigned female at birth, but that your sample does not have adequate representation of trans and nonbinary people who were assigned male at birth. Not only is it important to challenge sexism, misogyny and femmephobia in research, but having a sample exclusively or primarily comprising trans and nonbinary participants who were assigned female at birth would mean that your findings, interventions, recommendations and conclusions would only be applicable to these folks, and not others.

It is useful to research, and an issue of equity, to develop recruitment strategies and pay careful attention to sample diversity across multiple axes of identity and experience, as appropriate for your research study, questions or hypotheses.

Research team composition

People who are marginalized and minoritized based on their genders, sexes and sexualities may be reluctant to participate, or may refuse to participate, in research that is conducted exclusively by majoritized researchers. Part of collecting data from marginalized and minoritized participants in affirming ways is ensuring that, whenever possible, individuals who share these identities and/or experiences of marginalization are involved in all aspects of the research process, as respected collaborators, co-authors and leaders.

Example 1

The International Trans Health Forum has implemented a “Transgender Research Informed Consent Disclosure Policy,” which requires that researchers disclose certain details when soliciting research participation from within the group. Among other things, the policy asks whether and how trans and nonbinary scholars and researchers were included and involved in the research process. The policy acknowledges that knowing about research team composition may assist trans and nonbinary participants in their decision-making about whether to participate in research studies.

Example 2

InterACT, Advocates for Intersex Youth is a nonprofit organization, which advocates for the legal and human rights of children with intersex traits. In 2016, they published an official policy on participation in research. The policy describes how the organization’s goal is robust community-based participatory research. They indicate that they will only participate in studies where an officially recognized consultant from their community is involved from the project’s inception, prior to approval from institutional review boards, and where that individual will provide input into the goals and design of the study.

It may not always be possible to alter existing research team composition, and there are complex reasons why people who are marginalized and minoritized based on their genders, sexes and sexualities may be underrepresented in academia, research centres, and research teams. However, researcher team composition is valuable for ensuring that work is nuanced, accurate, and does not create or perpetuate harm. This is best facilitated by the direct involvement – and leadership – of the communities and individuals who are being included in the study. For example, Rosenberg and Tilley (2020) found that, although trans and nonbinary people remain largely excluded from leadership in the research conducted with their communities, a trans-led

research project “provides more in-depth data, builds more constructive rapport with community members, and produces more effective research than the norm of purely outsider research in the field” (923). Transparency regarding researchers and how they identify is key. Research team composition disclosures can demonstrate to prospective participants awareness of the importance of representation within research teams and how it may impact the recruitment and enrolment of participants.

Spotlight

Two-Spirit Dry Lab is Turtle Island’s first research group that focuses exclusively on Two-Spirit people, communities, and experiences.

They are a collaborative of Indigenous and settler researchers and community leaders engaged in research at the intersections of Indigeneity, gender, sexual orientation and geography.

[Learn more!](#)



Retention & inclusivity follow-through

Having recruited participants who are marginalized and minoritized based on genders, sexes or sexualities, an important component of retaining these participants is ensuring that other areas of the research are similarly inclusive. For example, recruiting participants of all genders and sexualities, but then failing to measure participants’ sexes, genders and sexualities in inclusive ways, may result in some participants discontinuing or withdrawing from the study. Thinking about inclusive research design in advance will help ensure that participants who are recruited to your study are also retained, resulting in fewer harms to your participants and their communities, higher quality data and better research outcomes.

Linking recruitment, sampling & analysis plans in research design

Sometimes, researchers approach research design and recruitment with a priori, planned analyses in mind. The following two illustrative examples link recruitment, sampling and a priori analysis plans together to demonstrate how these elements are interconnected in the research design process. They also demonstrate how including people who are marginalized and minoritized based on their genders, sexes and sexualities adds complexity to this process that merits attention. For discussion of *post hoc*, emergent analyses, check out [Tool #3!](#)

Example 1: Stratified sampling

In many fields including public health, researchers often employ a stratified sample. With stratified samples, strata – or groups – are homogenous, mutually exclusive and exhaustive subpopulations who share some characteristic in common. If you intend to stratify participants by gender identity, there are important conceptualization, research design and recruitment considerations to be made in advance.

Exhaustiveness

Strata are meant to be exhaustive, meaning that every person can be assigned to a stratum. When gender identity is the shared characteristic of stratum members, one must first grapple with the complexity and diversity of gender identity (and whether that is the variable to stratify based on, compared to other related ones like gender expression, aspects of sex, etc.). Remember, there are gender identities beyond the binary of man and woman, so your strata will need to reflect that diversity. How many gender identity strata will there be? Will you assign each participant to one of three strata (men, women, nonbinary)? Remember, trans women are women, and trans men are men, and should be stratified accordingly. Where will you assign a participant who identifies as something other than the strata that you've identified as relevant for your study?



Mutual exclusiveness

In stratified samples, participants can be assigned to one and only one stratum; in this case, based on the shared characteristic of gender identity. However, some people identify with multiple gender identities. Will participants who identify as both women and nonbinary be eligible for the study? If so, will they be invited to pick a stratum themselves, or will they be assigned to one stratum by the researcher? If the latter, to which stratum would they be assigned?

Homogeneity

In a stratified example, strata are meant to be homogenous, so that every participant within a single stratum is ostensibly the same based on a shared characteristic. When it comes to gender identity, there can be considerable heterogeneity among participants who share a gender identity – for example, not all women would characterize their womanhood in the same way. There can also be considerable heterogeneity within a stratum that is broadly or imprecisely defined. For example, if you had three strata, one for men, one for women, and one for everybody who identified as something other than a man or as a woman, there would be considerable diversity within this third group and potentially more than the first two. Would all nonbinary, agender, genderqueer, neutrois, bigender and demigender people (among others) be considered homogenous for the purposes of the study? How would you classify participants whose gender identities are specific to their culture, which do not translate directly into the stratum that you have created?

Identity temporality

For the purposes of stratification, are you concerned with participants' current gender identities? What if a participant identifies as a woman at the time of recruitment, but identified differently last year? What if a participant identifies as a man at the time of recruitment, but shares that their identity has changed to something other than a man sometime after stratification has already occurred?

Recruitment considerations

Having decided how you will stratify participants by gender identity, including how many strata there will be and what those strata will be called, you will need to recruit participants accordingly. You will also need to determine how many participants you need in each stratum, so that their sample sizes are large enough to draw statistical conclusions. For example, if you decide that there will be three strata in your sample (men, women, and nonbinary) and that strata assignment will be based on current gender identity, you will need to recruit participants who currently identify as men, women, and nonbinary. You may want to explicitly state that cis and trans men and women are encouraged to participate. You will also need to communicate whether participants who do not identify in one of these three ways at all or exclusively will be eligible for the study and, if so, how they will be stratified. If you were to struggle to recruit participants for one or more of the strata, targeted recruitment would become necessary. Check out the recommendations above for how to effectively recruit marginalized and minoritized participants!

Example 2: Comparative studies & analyses

In comparative studies, researchers attempt to detect, analyze and evaluate similarities and differences by comparing two or more groups, phenomena or ideas. There are qualitative, quantitative and mixed methods approaches to conducting comparative analyses. If you intend to compare participants of different genders, sexes, and/or sexualities to each other, there are important conceptualization, research design and recruitment considerations to be made in advance.

Defining sameness & difference

Comparative analyses can compare groups of participants who are understood as different from one another on some metric. To do so, researchers must thus first cluster together participants who are understood as similar on this metric in some way. That is, to compare participants of differing sexualities, you will first need to establish on what basis we are defining sameness and difference, and how granular you will be with your conceptualization. For example, will you compare all participants who describe themselves as exclusively straight to all participants whose sexualities are not exclusively straight? This would mean treating all gay, lesbian, bisexual, pansexual, asexual, queer, and other non-heterosexual identities as one, homogenous group.



Are you interested in sexual identity (how someone identifies), sexual orientation (e.g., to whom they are attracted), or sexual behaviour (with whom they are sexual), recognizing that these might be branched? (Check out [Tool #1](#) to help you understand the difference between these ideas, and why it matters!) Are you interested in whether participants' relationships are characterized by monogamy or polyfidelity?

Recruitment considerations

Having decided how you are conceptualizing sexuality and how you are defining sameness and difference for the purposes of your planned comparative analysis, you will need to recruit participants accordingly. You may also need to determine how many participants you need in each of your comparison groups so that the sample size of each group is large enough to draw statistical conclusions.

For example, you may decide that your research question or hypothesis is best answered by comparing five groups:


1. Participants who are not sexually attracted to anyone.
2. Participants who are attracted to just men.
3. Participants who are attracted to just women.
4. Participants who are attracted to more one gender.
5. Participants for whom gender does not factor into their sexual attractions.

You would therefore need to explicitly recruit participants who described their attraction in one of these five ways, recognizing that there will participants who *identify* in diverse ways within each group, both in terms of gender identity and in terms of sexual identity. Recruitment materials that list only certain sexual identities, but not others, might be insufficient for generating a robust sample for each of these five groups. If you were to struggle to recruit participants for one or more of your comparison groups, targeted recruitment would become necessary. Check out the recommendations above for how to effectively recruit marginalized and minoritized participants!

Additional readings & citations

This list includes both additional recommended readings and items that were cited in this tool.

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