OAO EXTERNAL RESEARCH SURVEY POLICY

Purpose

To safeguard member privacy, minimize burden, and support high-value research aligned with the Association's mission to advance optometry practice and patient vision care across Canada.

Scope

This Policy governs requests from external researchers (universities, hospitals, nonprofits, government, or industry) to distribute surveys to Association members. It applies to email, e-news, Facebook Forum, and member site notifications.

Eligibility & Mission Alignment

- Topics must be directly relevant to optometry (clinical practice, vision science, public health, professional education, health policy, or patient outcomes).
- Requests primarily intended for commercial marketing or product promotion will be declined.
- Researchers must outline member value (e.g., access to results, benchmarking, CE/CPD credit where applicable).

Ethics & Method Standards

- Research Ethics Board/IRB approval (or documented exemption) is required prior to distribution.

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- Plain-language informed consent must describe purpose, time commitment (≤15 minutes recommended), risks, data use, and withdrawal rights.
- Methodological quality: appropriate sampling frame, validated instruments or pilot testing, accessible design (Web Content Accessibility Guidelines), mobile friendly, and reasonable burden.
- Funding and conflict-of-interest disclosures must be provided in the request and displayed in the invitation.

Privacy, Security & Legal Compliance

- Member contact lists are not shared. The Association distributes invitations; researchers do not receive member emails or phone numbers.
- Compliance with applicable laws: PIPEDA (federal privacy), PHIPA (Ontario health information, if applicable), CASL (anti-spam), and GDPR where relevant (e.g., EU residents/data transfers).
- Use secure survey platforms (HTTPS, encryption in transit and at rest, role-based access, audit logs).
- A Data Handling Agreement must define roles (controller/processor), permitted uses, retention, anonymization/pseudonymization, breach notification, and cross-border transfers.

Timing, Frequency & Member Burden

- Maintain a survey calendar; limit external surveys to 1–2 per quarter to reduce fatigue.
- Avoid conflicts with conferences, renewal periods, CE deadlines, exams, and statutory holidays.
- Reminder cadence: ≤2 reminders, spaced appropriately; disclose any incentives and avoid coercion.

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Transparency & Results Sharing

- Researchers must share a de-identified executive summary of findings with the Association.
- Use of the Association’s name/logo requires prior written approval and must not imply endorsement.
- Raw data remains with researchers; aggregate summaries may be shared publicly at the Association’s discretion.

Process & Authority

- Requests are received through the External Survey Intake Form. They are reviewed to confirm adherence to guidelines and relevance to OAO members.
- The Association reserves the right to decline or defer requests.

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