

Consent and Release

Purpose:

- It provides a signed, legal agreement that protects participants who share their personal information.

When to use it:

- Organizations that collect personal information (including names and addresses) are obligated by law to use consent and release form.¹
- This form is administered by staff who delivers financial literacy education and it is filled out by participants and staff at the beginning a course.

Description:

- This form is an agreement between the participant and your organization explaining how the information will be used and making a commitment to ensure the confidentiality and anonymity of that information.
- Participants should be well informed about their rights and obligations. It is important to talk to all of your participants about both privacy and the obligations of your organization to protect the confidentiality of their personal information.

How to use it:

- Read the document out loud to participants and then encourage them to sign it. It is important to make it clear that participants do not have to fill out the forms if they choose not to. (won't affect ability to access FL)
- If you are entering data into a computer, the data should be kept on a secure computer. If your organization has not done so already, it should establish organizational protocols for privacy and confidentiality of information.

Tips for engaging participants:

- Creating trust is very important.
- Allow some time to explain the purpose of the evaluation and to walk people through the consent and release form.
- Ensure that participants understand and appreciate the purposes of evaluation and their essential role within it.
- Explain the process and make them feel that it is their opportunity to have a voice and make a difference.

¹ Please refer to the Office of the Privacy Commissioner of Canada's recent changes to the Personal Information Protection and Electronic Documents Act (PIPEDA): http://www.priv.gc.ca/leg_c/leg_c_p_e.cfm