

Recruitment Strategizing Worksheet

Define the characteristics of your population	Identify potential barriers to participation and retention
<ul style="list-style-type: none"> <input type="checkbox"/> What are their daily lives like? Where do they live, work, shop, and spend time? <input type="checkbox"/> Break down by demographics – age, disease status, etc. <input type="checkbox"/> Are they likely to be employed? Retired? Do they have leisure time? <input type="checkbox"/> Where do they get information in general and health information in particular? <input type="checkbox"/> What is their level of health literacy and experience with health care systems? <input type="checkbox"/> Are there different characteristics among different racial, ethnic, and socioeconomic groups? <input type="checkbox"/> How would these characterizations impact their willingness and availability? <input type="checkbox"/> Do you already have access to this population? <input type="checkbox"/> What would engage them with your study? Why would they want to participate? 	<ul style="list-style-type: none"> <input type="checkbox"/> Are there elements of the study design or inclusion/exclusion criteria that might be too limiting? Is it possible to revise some of the criteria? <input type="checkbox"/> Are there specific aspects of the study (procedures, timing) that would make it difficult to participate? <input type="checkbox"/> Does your site serve a large geographic area? Will there be a lot of travel time to study visits? <input type="checkbox"/> How much flexibility do you have with scheduling study visits? <input type="checkbox"/> Could people in this population have transportation problems? <input type="checkbox"/> What is the burden of time and inconvenience? Is there anything you can do to make participation more convenient? <input type="checkbox"/> How might they feel about medical research? <input type="checkbox"/> Do they have family responsibilities: childcare or elder care? <input type="checkbox"/> Would they have other medical conditions that might affect their participation (in addition to being excluded)?
Study start-up	Reaching your audience
<ul style="list-style-type: none"> <input type="checkbox"/> Evaluate strategies from other studies <input type="checkbox"/> How much do other studies pay? Where do you see studies advertised? Get feedback from participants. <input type="checkbox"/> Are there other clinical team members (social worker, physical therapists, etc.) who might have suggestions or could refer participants? Establish a referral network early in the process. <input type="checkbox"/> IRB recruitment materials basic tool kit <ul style="list-style-type: none"> <input type="checkbox"/> Brochures (mail, leave in clinics or community areas, etc.) <input type="checkbox"/> Flyers (for posting, could make into a poster or print ad, include with an outreach email) <input type="checkbox"/> Information statement: one paragraph description, suitable for newsletters, websites, emails, etc. <input type="checkbox"/> Approval for emailing participants information <input type="checkbox"/> Budget: Create line items for parking, and printing, targeted mailings; consider adding advertising and graphic design costs. 	<ul style="list-style-type: none"> <input type="checkbox"/> Identifying participants by screening upcoming clinic appointments. <input type="checkbox"/> Is there a service that searches the electronic medical records to identify potential participants? <input type="checkbox"/> Community outreach: advocacy organizations, senior centers, community centers, faith based organizations, support groups, and health fairs <input type="checkbox"/> Direct (specific individuals) and targeted (large scale, based on demographic profiles) mailings. <input type="checkbox"/> Online advertisements: Craigslist, and listserves. <input type="checkbox"/> http://participateinresearch.org (a local site hosted by ITHS). <input type="checkbox"/> Study-specific website. <input type="checkbox"/> Local advertising: Newspaper (consider community and neighborhood papers), public transportation. <input type="checkbox"/> Health reporters and bloggers: Is there something particularly innovative about what you're doing? <input type="checkbox"/> Social media: YouTube, Facebook. <input type="checkbox"/> Radio <input type="checkbox"/> Word of mouth: let participants know they can tell their friends.

Recruitment Strategizing Worksheet

Implementation	General guidance
<ul style="list-style-type: none"> <input type="checkbox"/> Make a plan for rollout <ul style="list-style-type: none"> <input type="checkbox"/> Staffing to take calls <input type="checkbox"/> Set a timeline for implementing each strategy and for reviewing metrics <input type="checkbox"/> Keep metrics: when each strategy was implemented, how many contacted you, where did they see the material? <input type="checkbox"/> Evaluate progress and meet with research team on a regular basis. Should you cast a wider net, or would a smaller net be a better use of time? 	<ul style="list-style-type: none"> <input type="checkbox"/> Making participation as easy as possible will help with enrollment and retention. <input type="checkbox"/> Provide compensation or gratuity, and pay for parking costs. <input type="checkbox"/> Can you get generic material IRB approved, i.e. text rather than specific images or design? <input type="checkbox"/> Plan to hit early and hit hard, and strategies are worth repeating. You will often reach people who didn't see your initial material.
Guidance for print materials	Resources
<ul style="list-style-type: none"> <input type="checkbox"/> They should draw the attention of your target audience. <input type="checkbox"/> Flyers should be eye catching and easy to read from a distance. What print materials capture <i>your</i> attention? <input type="checkbox"/> Use lay language <input type="checkbox"/> Avoid materials with only text, and use as little text as necessary <input type="checkbox"/> IRB will have guidance on content <input type="checkbox"/> Helvetica, Times New Roman, and Century generally considered most readable typeface; use 2 typefaces in materials <input type="checkbox"/> Avoid long stretches of text in all caps <input type="checkbox"/> Color is functional and communicates information <input type="checkbox"/> You may want to create different recruitment materials to target different demographics (age, sex, racial/ethnic populations) within your target population, i.e. more than one version of print materials <input type="checkbox"/> A professional looking design and print quality are important 	<ul style="list-style-type: none"> <input type="checkbox"/> Facebook: https://www.facebook.com/business/learn <input type="checkbox"/> Social media: https://recruit.ucsf.edu/introduction-social-media-recruitment-opportunities-and-challenges