

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? Are they working, or retired? <input type="checkbox"/> Consider the characteristics at different demographics levels <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"/> 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"/> Would availability of transportation be a barrier? <input type="checkbox"/> What is the burden of time and inconvenience? Is there anything you can do to make participation more convenient? <ul style="list-style-type: none"> • Consider eConsent, remote visits <input type="checkbox"/> How might they feel about medical research? <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"/> Are there other clinical team members (social worker, physical therapists, etc.) who might have suggestions or could refer participants? <input type="checkbox"/> Basic tool kit of recruitment materials <ul style="list-style-type: none"> • Brochures (mail, leave in clinics or community areas, etc.) • Flyers (for posting, could make into a poster or print ad, include with an outreach email) • Information statement <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"/> http://participateinresearch.org (a local site hosted by ITHS). Can act as the study's website or a "landing page" <input type="checkbox"/> Contacting participants who have been identified by the EMR or have upcoming clinic appointments <input type="checkbox"/> Community outreach: advocacy organizations, senior centers, community centers, faith-based organizations, support groups, and health fairs <input type="checkbox"/> Online advertisements/announcements: Craigslist, and listservs <input type="checkbox"/> Study-specific website <input type="checkbox"/> Local advertising: newspaper (consider community and neighborhood papers), public transportation <input type="checkbox"/> Social media: Facebook, YouTube <input type="checkbox"/> Word of mouth: let participants know that you're still recruiting
Implementation	General guidance
<ul style="list-style-type: none"> <input type="checkbox"/> Make a plan for rollout <ul style="list-style-type: none"> ○ Set a timeline for implementing each strategy and for reviewing metrics with the team <input type="checkbox"/> Keep metrics: when each strategy was implemented, how many contacted you, where did they see the material? 	<ul style="list-style-type: none"> <input type="checkbox"/> Making participation as easy as possible will help with recruitment and retention. <input type="checkbox"/> Provide compensation or gratuity, and pay for parking costs. <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

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Guidance for print materials	Resources
<ul style="list-style-type: none"><input type="checkbox"/> The goal is to pique someone’s interest so they will want to learn more<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 a tag line<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"/> Avoid long stretches of text in all caps<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"/> Social media:<ul style="list-style-type: none">• https://recruit.ucsf.edu/introduction-social-media-recruitment-opportunities-and-challenges• https://www.facebook.com/business/learn• https://trialinnovationnetwork.org/tin-toolbox/<ul style="list-style-type: none">○ Social Media Outreach & Recruitment Toolkit○ Recruitment & Retention Materials Content + Design Toolkit<input type="checkbox"/> Copyright free images: https://guides.lib.uw.edu/c.php?g=341352&p=2298336<input type="checkbox"/> ITHS: https://www.iths.org/investigators/tools-resources/recruitment-resources/<input type="checkbox"/> Free graphic design platform: https://www.canva.com<input type="checkbox"/> QR code: https://www.qrcode-monkey.com/