

Recruitment Strategizing Worksheet

Define the characteristics of your population of interest	Identify potential barriers to participation and retention
<ul style="list-style-type: none"> <input type="checkbox"/> Where do they live, work, shop, and spend time? <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"/> Would they likely have other co-morbidities? <ul style="list-style-type: none"> o These could be a barrier to participation in terms of their overall wellness, or an opportunity to cross reference with the condition you are studying. <input type="checkbox"/> What is their level of health literacy and experience with health care systems? <ul style="list-style-type: none"> o Often people with chronic diseases, such as Multiple Sclerosis or Lupus, are more interested in research opportunities or research in general. <input type="checkbox"/> What would engage them with your study? What's in it for them? Why would they want to participate? <input type="checkbox"/> Are there different characteristics among different racial, ethnic, and socioeconomic groups? 	<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"/> Does your site serve a large geographic area? Will there be a lot of travel time involved if they participate? <input type="checkbox"/> Do you anticipate screen failures? <input type="checkbox"/> How much flexibility do you have with scheduling study visits? <input type="checkbox"/> Could people in your target population have transportation problems? <input type="checkbox"/> What is the burden of time and inconvenience? Will they need to take time off of work? 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: child care, elder care?
Study start-up	Reaching your audience
<ul style="list-style-type: none"> <input type="checkbox"/> Evaluate strategies from other studies <input type="checkbox"/> Do your research: What flyers or posters catch <i>your</i> attention? How much do other studies pay? Where do you see studies advertised? Get feedback from participants. <input type="checkbox"/> IRB recruitment materials basic tool kit <ul style="list-style-type: none"> o Brochures (mail, leave in clinics or community areas, etc.) o Flyers (for posting, could make into a poster or print ad) o Information statement: one paragraph description, suitable for newsletters, websites, Craigslist, etc. o Approval for emailing participants information <input type="checkbox"/> Budget: Create line items for compensation, parking, and printing, targeted mailings; consider adding advertising and graphic design costs. 	<ul style="list-style-type: none"> <input type="checkbox"/> Clinics: Prescreen appointments for eligibility and approach participants in clinic or by mail <input type="checkbox"/> Are there other clinical team members (social workers, physical therapists, etc.) who might have suggestions or who could refer patients? <input type="checkbox"/> Community outreach: advocacy organizations, senior centers, community centers, faith based organizations, support groups, and health fairs <ul style="list-style-type: none"> o In addition to advertising or distributing material, there may be opportunities to give formal presentations. <input type="checkbox"/> Direct (specific individuals) and targeted (large scale, based on demographic profiles) mailings <input type="checkbox"/> Online advertisements: Participateinresearch.org, Craigslist, and listserves <input type="checkbox"/> Study-specific website <input type="checkbox"/> Other health care providers: Establish referral network and ongoing communication <input type="checkbox"/> Local advertising: Community and neighborhood newspapers (more affordable than major newspapers), arts organizations, and theatre programs; public transportation, local groups <input type="checkbox"/> Health reporters and bloggers: Is there something particularly innovative about what you're doing? <input type="checkbox"/> Social media: YouTube, Twitter, Facebook <input type="checkbox"/> Radio <input type="checkbox"/> Health clubs, pharmacies, libraries, dorms, grocery stores, laundromats, coffee shops

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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"/> Timing of efforts <input type="checkbox"/> Staffing to take calls (you will lose 50% if you don't speak to callers within 48 hours) <input type="checkbox"/> Keep metrics: How many phone calls or contacts are made for each strategy, timing of mailings or postings, etc? <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"/> Plan to hit early and hit hard, and strategies are worth repeating. You will often reach people who didn't see your initial material. <input type="checkbox"/> Rebounding from recruitment shortfalls can be more difficult as the study progresses <input type="checkbox"/> 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
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"/> Use lay language: a "research study" was rated by participants as less risky than a "clinical trial" <input type="checkbox"/> Avoid materials with only text, and use as little text as necessary <input type="checkbox"/> Pull offs with study contact information is helpful <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"/> Use color: Color is functional and communicates information <input type="checkbox"/> A professional design and print quality is important <input type="checkbox"/> Your institution may provide design assistance 	<ul style="list-style-type: none"> <input type="checkbox"/> Targeted mailings: Acxiom (www.acxiom.com) <input type="checkbox"/> The institution's communication's or printing office (e.g., UW Creative Communications/Mailing Services) <input type="checkbox"/> The institution's Public Affairs or Media Relations office <input type="checkbox"/> ITHS Research Coordination Center: study recruitment and marketing