## Recruitment Strategizing Worksheet

### Define the characteristics of your population of interest
- Where do they live, work, shop, and spend time?
- Are they likely to be employed? Retired? Do they have leisure time?
- Where do they get information in general and health information in particular?
- Would they likely have other co-morbidities?
  - 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.
- What is their level of health literacy and experience with health care systems?
  - Often people with chronic diseases, such as Multiple Sclerosis or Lupus, are more interested in research opportunities or research in general.
- What would engage them with your study? What’s in it for them? Why would they want to participate?
- Are there different characteristics among different racial, ethnic, and socioeconomic groups?

### Identify potential barriers to participation and retention
- 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?
- Does your site serve a large geographic area? Will there be a lot of travel time involved if they participate?
- Do you anticipate screen failures?
- How much flexibility do you have with scheduling study visits?
- Could people in your target population have transportation problems?
- 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?
- How might they feel about medical research?
- Do they have family responsibilities: child care, elder care?

### Reaching your audience
- Clinics: Prescreen appointments for eligibility and approach participants in clinic or by mail
- Are there other clinical team members (social workers, physical therapists, etc.) who might have suggestions or who could refer patients?
- Community outreach: advocacy organizations, senior centers, community centers, faith based organizations, support groups, and health fairs
  - In addition to advertising or distributing material, there may be opportunities to give formal presentations.
- Direct (specific individuals) and targeted (large scale, based on demographic profiles) mailings
- Online advertisements: Participateinresearch.org, Craigslist, and list serves
- Study-specific website
- Other health care providers: Establish referral network and ongoing communication
- Local advertising: Community and neighborhood newspapers (more affordable than major newspapers), arts organizations, and theatre programs; public transportation, local groups
- Health reporters and bloggers: Is there something particularly innovative about what you’re doing?
- Social media: YouTube, Twitter, Facebook
- Radio
- Health clubs, pharmacies, libraries, dorms, grocery stores, laundromats, coffee shops

### General guidance
- Making participation as easy as possible will help with enrollment and retention.
- Plan to hit early and hit hard, and strategies are worth repeating. You will often reach people who didn’t see your initial
Rebounding from recruitment shortfalls can be more difficult as the study progresses. 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**

- They should draw the attention of your target audience
- Use lay language: a “research study” was rated by participants as less risky than a “clinical trial”
- Avoid materials with only text, and use as little text as necessary
- Pull offs with study contact information is helpful
- IRB will have guidance on content
- Helvetica, Times New Roman, and Century generally considered most readable typeface; use 2 typefaces in materials
- Avoid long stretches of text in all caps
- Use color: Color is functional and communicates information
- A professional design and print quality is important
- Your institution may provide design assistance

**Study start-up**

- Evaluate strategies from other studies
- Do your research: What flyers or posters catch your attention? How much do other studies pay? Where do you see studies advertised? Get feedback from participants.
- IRB recruitment materials basic tool kit
  - Brochures (mail, leave in clinics or community areas, etc.)
  - Flyers (for posting, could make into a poster or print ad)
  - Information statement: one paragraph description, suitable for newsletters, websites, Craigslist, etc.
  - Approval for emailing participants information
- Budget: Create line items for compensation, parking, and printing, targeted mailings; consider adding advertising and graphic design costs.

**Implementation**

- Make a plan for rollout
  - Timing of efforts
  - Staffing to take calls (you will lose 50% if you don’t speak to callers within 48 hours)
- Keep metrics: How many phone calls or contacts are made for each strategy, timing of mailings or postings, etc.?
- 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?

**Resources**

- Targeted mailings: Acxiom ([www.acxiom.com](http://www.acxiom.com))
- The institution’s communication’s or printing office (e.g., UW Creative Communications/Mailing Services)
- The institution’s Public Affairs or Media Relations office
- ITHS Research Coordination Center: study recruitment and marketing