

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

material.

- 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)
- 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