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| Define the characteristics of your population | Identify potential barriers to participation and retention |
| * What are their daily lives like? Employed or retired? morbidities, here do they live, work, shop, and spend time? * Break down by demographics – age, disease status, etc. * Are they likely to be employed? Retired? Do they have leisure time? * Where do they get information in general and health information in particular? * What is their level of health literacy and experience with health care systems? * Are there different characteristics among different racial, ethnic, and socioeconomic groups? * How would these characterizations impact their willingness and availability? * Do you already have access to this population? * What would engage them with your study? Why would they want to participate? | * 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? * Are there specific aspects of the study (procedures, timing) that would make it difficult to participate? * Does your site serve a large geographic area? Will there be a lot of travel time to study visits? * 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? Is there anything you can do to make participation more convenient?** * How might they feel about medical research? * Do they have family responsibilities: childcare or elder care? * Would they have other medical conditions that might affect their participation (in addition to being excluded)? |
| Study start-up | **Reaching your audience** |
| * Evaluate strategies from other studies * How much do other studies pay? Where do you see studies advertised? Get feedback from participants. * Are there other clinical team members (social worker, physical therapists, etc.) who might have suggestions or refer participants? Establish a referral network early in the process. * 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. | * Identifying participants by screening upcoming clinic appointments. * Is there a service that searches the electronic medical records to identify potential participants? * Community outreach: advocacy organizations, senior centers, community centers, faith based organizations, support groups, and health fairs * Direct (specific individuals) and targeted (large scale, based on demographic profiles) mailings. * Online advertisements: Craigslist, and listserves. * Study-specific website. * Local advertising: Newspaper (consider community and neighborhood papers), public transportation. * Health reporters and bloggers: Is there something particularly innovative about what you’re doing? * Social media: YouTube, Facebook. * Radio |
| Implementation | **General guidance** |
| * Make a plan for rollout   + Staffing to take calls   + Set a timeline for implementing each strategy and for reviewing metrics * Keep metrics: when each strategy was implemented, how many contacted you, where did they see the material? * 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? | * **Making participation as easy as possible will help with enrollment and retention.** * Provide compensation or gratuity, and pay for parking costs. The compensation should be accessible to your population. * Can you get generic material IRB approved, i.e. text rather than specific images or design? * 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** |
| * They should draw the attention of your target audience. * Flyers should be eye catching and easy to read from a distance. What print materials capture *your* attention? * Use lay language * Avoid materials with only text, and use as little text as necessary * 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 * Color is functional and communicates information * 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 * A professional design and print quality are important | * Facebook: <https://www.facebook.com/business/learn> * Social media: <https://recruit.ucsf.edu/introduction-social-media-recruitment-opportunities-and-challenges> |