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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)?
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| 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
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| 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.
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| 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>

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