

RRRC's Recruitment & Retention Planning Roadmap

Welcome! Whether you're planning a study or your trial is already underway, this document outlines key considerations for recruitment planning and troubleshooting. We encourage teams to review this document as a group and use the discussion questions to guide conversation.

If you have questions or would like a free consult, contact the [ICTR Recruitment & Retention Resource Center \(RRRC\)](#). For additional resources, visit our [Resource Library](#).

We're always working to improve our services and resources. If you have feedback or suggestions on this roadmap, or are looking for other materials, please [reach out](#)!

Recruitment is hard, but we're here to help!

Study Population Planning

Discussion Question: *Who do you envision participating in your study? What do you know or not know about them? What would motivate them to join your study?*

Key Considerations

- **Study Population**
 - How many participants do you aim to recruit, factoring in those who drop out or are lost to follow up?
 - Do you have any goals for enrolling specific populations or demographics groups?
- **Eligibility Criteria**
 - Do your eligibility criteria prevent any populations from participating (e.g., people with comorbidities or psychiatric diagnoses, people living in remote areas, etc.)?
 - If so, what's the rationale behind not including them? Is it scientific, safety, convenience? What are the potential tradeoffs of broadening your criteria?
 - Is the study limited to English speakers? Is it possible to include those who speak other languages, or with limited English proficiency?
- **Challenges**
 - What challenges do you anticipate when recruiting your study population?
 - What obstacles could potential participants face that prevent them from participating? How can you help participants avoid or overcome these?
- **Motivations**
 - What might motivate participants to take part in your study (e.g. personal interest, financial compensation, access to resources, a desire to help others, etc.)?
 - How can your recruitment messaging and approach tap into these motivations?
Note: You should consider compensation as a potential motivation, but that should not be emphasized in your messaging.

- What is your central message, hook, or elevator pitch to potential participants? Can you explain this in 60 seconds or less? How will you express this during recruitment, both verbally and in print recruitment materials?
 - Start honing this messaging early and run it past someone from your study population, peers, family members, and friends to get feedback.
- **Estimate your reach**
 - Review recruitment outcomes from past studies that included this population.
 - Connect with local research teams recruiting similar populations to gather insight into their recruitment experiences.
 - Anticipate where you may suffer losses in your recruitment pipeline. Use this information to adjust your recruitment strategy and timeline. Consider common challenges such as:
 - Participants who express interest but subsequently cannot be reached
 - No-shows to scheduled study appointments
 - Participants later found to be ineligible or fraudulent
 - Incomplete data that cannot be included in analytic data set

Ali & Anne's top tip! Practice and hone your pitch for the study. For most of us, this is a skill that doesn't come naturally and must be practiced in front of others, refining the message iteratively based on feedback.

Resource List

- **SMPH Recruitment Core:** Provides feasibility counts for UW Health patients and supports recruitment through electronic health record (EHR) methods, including providing patient lists for MyChart, clinic, and mailed letter recruitment.
- **Translation & Interpreter Services:**
 - **IRB's Enrolling Participants with Limited English Proficiency Guidance:** Learn about interpreters, written translations of study-related documents, informed consent processes for participants with limited English proficiency, and resources for oral interpretation & written translations.
 - **UW Health Language Access and Interpreter Services**
 - **UW Survey Center Spanish Language Instrument Development and Implementation:** UWSC staff can translate and implement Spanish-language survey instruments, as well as supporting study materials such as advance letters and brochures.
- **Community Engagement:** If your study involves community-engaged research or a community advisory board, **Wisconsin Network for Research Support (WINRS)** can help. WINRS facilitates several established advisory boards, including **Community Advisors on Research Design & Strategy (CARDS)** and **Board of Older Adult Advisors (BOAAs)**, which provide valuable input from community and participant perspectives on study materials and design.

- **Practice-Based Research Network (PBRN):** Consider partnering with a PBRN to expand clinical trials into real-world settings. PBRNs are networks of clinics and providers who collaborate to answer practical healthcare questions during routine care. Below are two UW PBRNs:
 - [Wisconsin Research & Education Network \(WREN\)](#): WREN promotes and conducts primary care research and education in partnership with primary care clinicians and the communities they serve.
 - [Pharmacy Practice Enhancement and Action Research Link \(PearlRx\)](#): PearlRx, the nation's largest research network of its kind, connects pharmacists and researchers to improve Wisconsin practice.

Recruitment & Retention Logistics

Discussion Question: Looking back at previous studies, did any staffing challenges such as insufficient staffing or lack of training impact your recruitment and retention outcomes?

Key Considerations

- **Enrollment Timelines**
 - What's your enrollment timeline? Create a realistic plan factoring in study startup time.
 - How many participants do you need to enroll per month to meet your enrollment goal?
 - What is your plan if you do not meet your monthly enrollment goals?
 - How will you track screening, enrollment, and retention? What metrics are you collecting? See 'Recruitment & Retention Monitoring and Tracking' below for suggestions.
 - What will you do if many prospective participants decline to participate?
 - How will you handle losing participants to follow-up?
- **Staff Effort & Training Considerations**
 - What staffing is needed to support your study's recruitment and retention methods?
 - Factor in study startup timeline for developing recruitment and participant-facing materials, plain language consent form, and all recruitment and retention tracking methods- these can take a lot of staff effort.
 - What roles and responsibilities will each team member have in the recruitment and retention process? Will you need to hire any additional staff to fill gaps?
 - How will you balance staff effort needed for recruitment, enrolling participants, completing study visits, and retention efforts?
 - Do team members feel prepared and supported to engage with participants from a variety of backgrounds? Or to support participants who may disclose personal challenges they're facing? If not, what steps will you take to build these skills?
 - Are there skills or areas of expertise currently missing from your team that could affect participant recruitment or retention? How can you address these gaps?

Resource List

- [RRRC's How We Talk With Research Participants Workshop Series \(Fall 2025\)](#): Series focused on verbal communication with study participants (videos will be posted once available)

- [UW's Continuing Education \(Leadership, Management & Workplace Skills\)](#): Explore upcoming paid trainings to help team members build and strengthen key professional skills.
- These two publications discuss the perspectives and training needs of researchers and study staff to better include individuals from a wide range of backgrounds.
 - [Susan R. Passmore, Dorothy Farrar Edwards, Christine A. Sorkness, Sarah Esmond, and Allan R. Brasier \(2020\)](#)
 - [Susan Racine Passmore, Abby Kisicki, Andrea Gilmore-Bykovskyi, Gina Green-Harris, and Dorothy Farrar Edwards \(2021\)](#)

Eligibility Screening

Discussion Question: *What are all the ways you could assess if prospective participants qualify for your study, and which are most appropriate for your population and team?*

Key Considerations

- **Define Screening Process**
 - Plan a consistent process for screening participants (e.g., online questionnaire, phone screen, in-person screen, chart review, or a combination) and specify what information will be collected through each method.
 - Review [IRB guidance](#) on eligibility screening.
 - When selecting your method(s), consider the following:
 - **Participant Preferences:** How does your population of interest prefer to be screened? What tools do they know how to use and have available to them? (e.g. phone call or online survey- such as Qualtrics or REDCap surveys)
 - **Sensitivity of Questions:** Are any screening questions too sensitive for certain methods (e.g., online vs. phone)?
 - **Staff Capacity:** Do you have sufficient staff time, resources, and expertise to screen as planned? Do you have flexibility to screen outside standard working hours? How will you handle a surge in interest?
 - **Self-Reporting:** Will participants understand and honestly self-report the required information?
 - **Sampling Strategy:** Do you need to purposively sample for demographics, lived experiences, or other characteristics? How will this selection occur?
 - **Participant Selection:** If more people qualify than you can include, how will you select participants fairly?
- **Challenges**
 - What challenges might participants face in the screening process?
 - Where might participants drop off or disengage from the screening process?
 - What technical, logistical or communication challenges could arise during screening?
 - What are potential challenges your study team may face during the screening process?
- **Participant Considerations**

- How can your team design the screening process to ensure a variety of people can participate?
- What contact information can you collect to ensure you can reach prospective participants? What other information can you collect to facilitate reaching them, such as their preferred contact method, overall availability and schedule?
- If prospective participants do not qualify or express interest after the study is closed to enrollment, how will you communicate that to them? Are there other research opportunities you can direct them to?
- **Testing & Support**
 - Test your screening process with someone outside your study team, preferably from your study population or unfamiliar with your research.
 - For instance, ask them to trial any screening surveys and provide feedback on whether the questions and language were clear, and if they experienced any technical issues. Practice phone screening scripts to ensure clarity and comfort during conversations.
 - Provide study team contact information on participant-facing materials in case participants have questions or encounter issues with the screening process.

Ali & Anne's top tip! *Study planning and startup is a busy time, and it's easy to overlook screening or assume it will go smoothly. Screening is an integral part of the study process- give it the same level of attention as any other key activity. Plan, test, and evaluate how it's going-and adapt as needed.*

Resource List

- **REDCap (SMPH)**: REDCap (Research Electronic Data Capture) is a self-service, secure, web-based application for study teams to use in building and managing data collection forms. REDCap provides data management functionality by allowing the development of eCRFs and surveys to support data capture for research studies.
 - [REDCap Knowledge Base](#)
 - [REDCap: Training Resources](#)
- **Qualtrics (Surveys)**: The UW–Madison Qualtrics Survey Hosting Service allows the campus community to easily create surveys, collect and store data and produce reports.
 - [Qualtrics Knowledge Base](#)

Recruitment Methods & Budget

Discussion Question: *What do your usual recruitment process and budget look like, and are there methods you haven't yet explored? What would need to be in place for you to try something new?*

Key Considerations

- **Recruitment Plan**

- What strategies will you include in your recruitment plan, and how effectively will they reach your study population?
 - Use a combination of active methods (e.g., phone calls, provider referrals) and passive methods (e.g., flyers, social media ads) to maximize staff efficiency and participant reach.
- Do your recruitment methods encourage participation from individuals with varied backgrounds and experiences? If not, what other methods can you incorporate?
- Establish a timeline for implementing recruitment strategies. Will you begin with a few methods and expand to additional approaches as needed?

Ali & Anne's top tip! Many study teams rely on free or passive recruitment methods, such as mass emails or flyers. While these approaches can be effective, we encourage you to consider additional strategies. Having a backup method prepared and described in your IRB application can improve your ability to respond quickly and effectively to challenges that may arise with your primary recruitment approach.

Recruitment Method & Budget Consideration

Note: Please note that this table is not exhaustive. We will continue to update it with additional methods and revised costs and the current version can be found on the [RRRC Resource Library](#).

Method	Cost	Notes
UW-Madison Methods		
Mass email UW staff & students	Free	• Request via Research Email Service. • Can send to all current UW–Madison employees and/or all current UW–Madison students. Limited filter options. • Plan how to respond to an initial surge of responses. • May lead to a homogeneous sample if not supplemented with other methods. • See RRRC tipsheet on how to craft an effective mass email message.
Mail via UW Survey Center	Variable	• Contact UW Survey Center for pricing. • UWSC can send recruitment letters for mail and web surveys.
Clinical Recruitment & UW Health Patients		
Note: To access UW Health patient information for recruitment purposes, a faculty member or collaborator must be part of the UW-Madison Health Care Component . Review guidance .		
Clinical care team referral	Free, but time intensive	• Engage with providers who serve your study population to explore opportunities for patient referrals to your study. • Reminder: Patients should be approached first by someone who is part of their care team or an administrator who is part of the clinic or department in which the study is being conducted.

		Potential patient-participants should provide oral or written permission to be approached by researchers in this private setting, or to be contacted later. See IRB Clinical Recruitment Guidelines .
In-clinic recruitment (Investigator or study team member)	Free, but time intensive	- Requires collaboration with clinic staff and may be resource intensive, as study personnel need to be present in the clinic to engage with interested patients. Reminder: Any patient should be approached first by someone who is part of their care team or an administrator who is part of the clinic or department in which the study is being conducted. Potential patient-participants should provide oral or written permission to be approached by researchers in this private setting, or to be contacted later. See IRB Clinical Recruitment Guidelines. SMPH Recruitment Core can provide Candidate Recruitment Lists, including upcoming clinical appointments.
MyChart Recruitment Invitations	Free	- Send MyChart invitations to eligible patients to participate in your research study. - A study team member will need Health Link access to facilitate screening, messaging, and follow up. - Learn more by watching UW CTI's MyChart & Research: Recruitment & More (2024). - Contact the SMPH Recruitment Core to get started.
Mail- UW Health Patients	Low cost, but there may be costs for printing postcards and other supplies & postage.	The SMPH Recruitment Core can provide Candidate Recruitment Lists of UW Health patients who may be eligible for your study, which can be used to send recruitment letters.
Real-time Recruitment Alerts	Varies on build needs	- Best Practice Advisories are clinical decision support tools. They can be used within Health Link to alert a study team via In Basket (messages within Health Link) and/or page when patients at UW Health facilities meet basic eligibility criteria. These tools are best suited for studies requiring time-sensitive recruitment (e.g., a patient must be enrolled within 24 hours of meeting criteria). - Contact the SMPH Recruitment Core to get started.
Community-Based Outreach		
Community engagement	Low cost, but time intensive	- Building trust and visibility within the community takes time and consistency. To foster engagement and encourage study participation through trusted networks, attend local events, connect with community leaders, health educators, community health workers, or other trusted individuals, and offer value such as educational presentations or health screenings. - Looking for assistance or how to get started? Reach out to Wisconsin Network for Research Support (WINRS), Morgridge Center for Public Service, or Center for Urban Population Health.

Community outreach/tabling at events	May require a sponsor or tabling fee, typically starting around \$50. Signage, table skirt, study branded swag, and tent can run several hundred dollars.	- Check for upcoming festivals and fairs, community center or organization events, health fairs, farmer markets, science fairs and events, etc. UW's Media Solutions can create banners and other signage for events. See pricing. - RRRC can recommend venues & events and suggest interactive activities to draw people to your table.
Word of mouth/referrals	Free to low cost	Ask participants to refer peers or people they know. Consider providing compensation to people who refer others to your study.
Earned media	Free, but time intensive and may require media training	- Earned media involves identifying relevant media outlets and cultivating relationships with media contacts prior to requesting free coverage of your study. - Examples: - Members of a Waisman team went on La Movida radio station show to discuss their study. A study on a health condition reached out to podcasters who cover that condition asking if they would speak with PI about the study on their podcast.
Print & Physical Advertising		
Flyering (Paper)	Very low cost	- Hang or pass out on campus, in the community, in clinics, and other organizations. - Flyers can no longer be hung in UW Health facilities, but care teams can still provide flyers to patients. - RRRC can suggest venues for flyering and advise on language & design. RRRC also has a fee-for-service Flyer Design Service to create study flyers.
Print ads	Eighth page: \$150-800+ Half page: \$425-1530+ Full page: starting at \$1,200	- Identify television stations that reach your participant population. <i>Isthmus</i>: Cost: \$1530 half page, \$800 quarter page, 35k copies printed - Option for pre-printed inserts. No demographic info available on readers. <i>Cap Times</i>: Cost: full page \$750, half page \$425, quarter page \$225 - Offers photography and design & ad packages. Can also place ads in digital newsletter with 43% open rate, daily and weekly options. Readers are generally affluent and average age is 48.

		• <i>Daily Cardinal:</i> ○ Cost: Ranges from \$150 for 1/8 page, to \$1200 for full page. ○ Published biweekly. Also, website, newsletter and social advertising options are available. This method might reach same audience as Research Email Service.
Metro bus ads (exterior of bus)	Varies widely, \$1,500-12,000	• Cost: packages start at \$1500 for 4 weeks on 4 buses, up to \$12k for large ads on 10 buses for 12 weeks. • Individual vehicle advertising generates between 30,000 to 70,000 daily vehicle impressions. • Cannot select specific routes or regions. • Advertise with Metro Transit (Madison)
Digital & Social Media		
Social media – paid ads	Price varies based on objective, audience, placement, and competitive auction.	• Learn more about costs for: ○ Meta Platforms ○ Google & YouTube Ads • OpenClinica Recruit is a recruitment platform that helps academic researchers accelerate participant enrollment using digital advertising and customized engagement tools.
Social media- private groups	Free	• Organizations serving those with health conditions or living in a specific area may promote your study. Requires relationship building and finding an org that has goals in common with you. • Contact RRRC for examples of partnerships and recruitment posts.
Online media & newspaper	\$250-500	• Identify online media outlets that reach your intended participant population. • <i>Isthmus (online):</i> ○ Story feature 1-3 slides for \$250 ○ Sponsored post \$500 for 31k followers • <i>Cap Times (online):</i> ○ Ads in digital newsletter with 43% open rate, daily and weekly options. Readers are generally affluent and average age is 48.
Organizational partnership	Free	• Partner with organizations, nonprofits, or professional associations to share your study via their listservs, newsletters or social media. • RRRC can share examples.
Informational Video	Video production & editing cost \$98-147/hr	• Media Solutions: Can plan and produce a short video to provide potential participants with more information about the study, or specific study activities that may not be well known or cause hesitancy. See pricing. • UW Health Media Center has a Video Library and Photo Gallery of health-related videos and images.

		- Create your own video using Canva or Adobe Express (pro version via UW). Both options offer free videos and images. - Stock image sites like istockphoto sell video clips you may be able to use if you're creating your own video.
Online Participant Platforms	Low	<i>Prolific</i> Cost: Minimum \$8/hour per participant; recommended \$12/hour. Platform fee added on top (lower for academics/non-profits). - Used for survey, task and interview studies. - Requires careful monitoring for fraudulent responses and data quality. Prolific Pricing Calculator. <i>Amazon Mechanical Turk (MTurk)</i> Cost: You set participant pay and MTurk charges a 20% fee. - Widely used for behavioral and cognitive studies, particularly with short task activities. - Requires careful monitoring for fraudulent responses and data quality. MTurk Pricing Info.
Panels	Varies considerably but often around \$2k per question, and usually with a minimum # of questions. WisconSays : "One question unit costs between \$1,800 to \$2,000"	Online panels such as those maintained by RAND , Nielsen , NORC , and SSRS offer researchers the opportunity to include their survey questions in panel survey(s). There are also special panels for specialized populations such as teachers , teens , and veterans but at a high cost. Lastly, WisconSays is an online public opinion panel maintained by the UW Survey Center.
Broadcast Media Note: Identify media that reaches your study participant population.		
Radio	Ads: \$40-110+ Campaign: \$2,500- 5,000+	<i>Wisconsin Public Radio (WPR):</i> Cost: WPR south Central region 15 second ads during <i>news</i> range from \$60-110 net rate per spot and \$40-85 during <i>music</i> programming Note: WPR skews older and affluent <i>iHeartMedia Radio:</i> Cost: A healthy radio budget for Madison stations is about \$2.5k-5k per station/per month, depending on the station. - One UW study team recently used iHeart Media for radio and podcast ads over 3 months was ~11k.

Podcasts	Free to \$3,000+	• Medical & scientific podcasts might be willing to discuss your trial or research topic for free (see earned media section). • iHeartMedia podcasts: \$3,000 minimum.
TV	Ads: \$30-300+ Campaign: \$1,500-10,000+	• UW Health Media Center: Their media team can arrange interviews, experts, B-roll and other needs for reporters' stories. • WMTV (channel 15): ○ Price of advertising is generally based on the viewer amount & reach. Shows are priced accordingly. Below are some examples of rates for 30 second ads. ○ Cost for 30sec ads: ▪ 5AM News \$70 ▪ 6AM News \$170 ▪ 7-9AM Today Show \$130 ▪ Jenna and Friends \$45 ▪ Mid-Day News \$60 ▪ Kelly Clarkson 2PM \$30 ▪ 15 News at 4PM \$100 ▪ 15 News at 5PM \$225 ▪ 15 News at 6PM \$300 ▪ 15 News at 10PM \$190 ○ Sports: ▪ Depending on study population, WMTV can suggest sport programs. ▪ Cost: Varies greatly (\$1,500- \$10,000) ○ Additional WMTV Options: ▪ YouTube, Targeted Display, Streaming TV, and Streaming Audio
Special Populations		
K-12 School Recruitment	Low cost PeachJar: \$25 per school, per flyer, per month (bulk discount)	• Options include distributing flyers through school newsletters or online platforms, partnering with school staff or parent organizations, presenting at school events, or school announcements. • Madison Metropolitan School District External Research Information. • Consider expanding recruitment outreach beyond Madison district. • PeachJar: Many schools have moved to this digital communication platform that connects school districts with families by distributing electronic flyers and resources directly to parents.

Participant-Facing Materials

Discussion Question: *What types of recruitment ads or materials have you seen recently (online, in print, or in your community), and what made them stand out (positively or negatively)? What can you learn from those examples when designing your own?*

Key Considerations

- **Types of Materials**
 - What recruitment materials do you need to create and what level of study information should each contain?
 - Determine what materials would be best for your study and population: postcards, flyer, brochure, one-pager, FAQ document, study website, recruitment letter, phone script, newsletters, reminder texts/emails, etc.
 - Decide what information should be covered in each material, for instance what to include on a recruitment flyer vs. what will be included in the consent form.
- **Recruitment Materials**
 - Consider the key information participants need to make an informed decision about joining your study. This may include:
 - The purpose of the study and why it is relevant or meaningful to your audience.
 - Description of study activities
 - Time commitment and expectations
 - Compensation
 - Eligibility criteria
 - Contact information for questions or concerns.
 - QR code or [short URL](#) to access more information or screening form.
 - Review [IRB guidance](#) on preparing recruitment materials and [worksheet](#) on advertisements.
- **Design Elements**
 - When designing participant-facing materials:
 - **Use Plain Language:** Follow plain language principles to ensure clarity and readability.
 - **Keep It Concise:** Scrutinize every sentence and only include what's essential.
 - **Aim for a 5th–6th Grade Reading Level:** Use readability tools to check and adjust language complexity.
 - **Use Visual Appeal:** Incorporate headlines, visuals, and graphic design elements to capture attention and improve engagement.
 - **Ensure Visual Relevance:** Select images and graphics that reflect your study population and activities.
 - **Add Team Images:** Adding photos of the study PI or team can make your team seem approachable and make the materials more engaging.
 - **Use UW Branding:** Incorporating official logos and branding can enhance credibility and trust.

- **Create Multiple Versions:** Develop several variations to reach different audiences and increase variety of populations reached.
- **Seek External Feedback:** Ask individuals outside your study team to review materials for clarity and appeal.
- **Need Support?**
 - The RRRC can assist with plain language editing, design, and visuals. We can also share examples of recruitment materials developed by other study teams for inspiration.

Ali & Anne's top tip! *It takes a lot of time to create strong recruitment materials, but this investment is worth it. If you've been using the same text-heavy recruitment materials for ages, reach out to RRRC and we can help you update these to make them fresh and compelling!*

Resource List

- **General Resources**
 - [RRRC's Best Practices for Study Recruitment Materials](#): View our brief guide that highlights best practices for creating participant-facing materials, including examples of strong materials and links to additional resources.
 - [RRRC's Recruitment Materials Repository](#): View our curated collection of participant-facing materials such as study recruitment flyers and brochures, social media ads, videos, etc. The repository will be a valuable source of inspiration as you plan your recruitment and outreach materials. Anyone at UW may request access to the repository [here](#).
 - [RRRC's TIP SHEET: Creating an effective research recruitment email using the Research Email Service](#)
- **Language & Readability Tools:**
 - [UW's Plain Language Training](#): Free course series open to faculty and staff. Covers word choice, grammar, content organization, and formatting.
 - [Hemingway Editor](#): This site will take your text and highlight lengthy or complex sentences and common writing errors. It also provides readability scores to ensure your content remains clear and easy to understand.
 - [Microsoft CoPilot](#): Copilot helps simplify language and improve readability by flagging complex sentences, suggesting clearer alternatives, and generating ideas like flyer headlines. UW–Madison policy ensures your data stays private and is not used for training.
- **Free Design Tools & Services:** These free, user-friendly platforms offer templates, images, and design elements to help you create professional recruitment materials and study websites.
 - [Adobe Express](#) (Free to UW staff & students- [how to download Adobe Creative Cloud & Adobe Express](#))
 - [Canva](#) (Free & paid versions)
 - [WiscWeb WordPress](#): A free platform for creating and maintaining a UW-Madison branded website.

- **Information Video:**
 - [Media Solutions](#): Can design and produce short videos explaining study information.
- **UW Branding:**
 - [UW's Applying the Brand in Print](#): Learn more about UW's colors, graphics, logos, and available photography.
 - [UW's Tips for Creating Branded Designs in Canva](#)
- **IRB Guidance:**
 - [UW's IRB Preparing Recruitment Materials](#)
- **Community Advisory Boards (CABs):** CABs can provide valuable community and participant perspectives on participant-facing materials. Consider working with existing CABs:
 - [Community Advisors on Research Design & Strategy \(CARDS\)](#)
 - [Board of Older Adult Advisors \(BOAAs\)](#)

Retention Methods

***Discussion Question:** How can you best engage and stay in touch with participants throughout the study?*

Key Considerations

- **Frequency of Contact**
 - Specify how often and through which channels participants will be contacted during the study. See methods below. The goal is to maintain participant interest and ensure ongoing communication.
- **Contact Information Collection**
 - What alternative or non-traditional contact methods can you collect to stay in touch with participants, such as social media handles, messaging apps (e.g., WhatsApp, Signal), or preferred community contacts? These options can be useful for participants who may not consistently use email or phone and can support retention and follow-up. Note: you'll need to consult with the IRB about the permissibility of such methods.
- **Retention Methods**
 - Develop a comprehensive plan to keep participants engaged throughout the study. Use a structure similar to your recruitment plan to ensure consistency and clarity. See ideas below.
- **Results Dissemination**
 - Describe how and when de-identified study findings will be shared with participants—both during the trial (e.g., interim updates) and after its conclusion. This can include summary reports, presentations, or other formats tailored to participant preferences.
 - Will results dissemination presentations be in-person, virtual, or both? Consider whether it would be more meaningful for participants to be invited to campus, or if hosting an event within their community would offer greater value and access.

Retention Methods

Topic	Method
Participant Engagement	• Regular check-ins via phone, email, or text • Personalized communication (e.g., birthday or milestone cards) • Clear and consistent updates about study progress • Regular newsletters or updates on study findings
Convenience & Flexibility	• Flexible scheduling for study activities and visits • Offer virtual or community-based visits when possible • Provide transportation or reimbursement if in-person visits are needed • Provide customized study calendar, noting when activities should be completed
Participant Incentives	• Monetary compensation or gift cards • Non-monetary incentives (e.g., certificates, small gifts) • Entry into raffles or drawings (Note: Please see UW's IRB Participant Remuneration & Compensation)
Relationship Building	• Assign a consistent study coordinator or contact person • Build rapport through empathetic and respectful communication
Reminders & Follow-up	• Reminders via text, email, postal mail, or phone • Follow-up calls for missed study visits or activities
Feedback Opportunities	• Surveys or interviews to gather participant feedback • Adjust protocols based on participant input • Acknowledge and act on participant concerns

Ali & Anne's top tip! Building strong relationships and rapport with participants is essential for successful retention. As a team, consider how you can foster meaningful connections throughout the study. Strategies might include allowing time for informal, non-study-related conversations, assigning each participant a consistent point of contact, including handwritten notes with mailed materials, and sending birthday or holiday cards to show appreciation and care.

Resource List

- [Respondent Tracking and Locating](#): UWSC obtains and updates telephone numbers, email addresses, and mailing addresses of sample members using state-of-the-art locating tools, including nation-wide credit bureau databases, fee-for-service locator websites, professional web-based information resources, and other sources.

Recruitment & Retention Monitoring and Tracking

Discussion Questions:

- *What information do you need to capture to evaluate how successful your recruitment and retention work is? How can you ensure this information is systematically and uniformly collected?*

Key Considerations

- **Monitoring Plan**
 - How will you track recruitment and retention work? How can you tell if it is going well?
 - What systems or software will you use to store data (e.g., REDCap, Excel)?
 - Who will monitor recruitment and retention efforts, and how/how often will updates be shared with your team?
 - What data quality checks can you run on the tracking data to ensure it is high quality throughout the study? What data quality issues could arise?
- **Track Key Metrics**
 - At a minimum, collect the information below to monitor and evaluate your recruitment and retention:
 - Overall accrual numbers
 - Accrual trends (monthly or quarterly)
 - Accrual by source (how participants heard about the study)
 - Demographics
 - Reasons for screen failures
 - Reasons eligible participants declined to enroll
 - [Changes in participant status](#)
 - Reasons for participant dropout
 - Reasons for lost to follow up (and definition for this status)
 - Basic costs of recruitment methods
 - Calendar with key recruitment dates (date study opened to accrual, start/end date for ad campaigns, etc.)
 - Additionally, you may wish to collect or compute the following information, which will take more effort to compile but can give insight into best methods for recruiting your study population:
 - Conversion rate, yield rate, recruitment rate (information [here](#))
 - Staff effort or FTE for recruitment activities (precise or an estimate)
 - Cost per enrolled participant
 - Number needed to randomize
 - Reasons enrolled participants gave for joining the study
 - (If a multi-site trial) Variance in recruitment process by site
 - Create and test data collection forms to capture the above variables and be cautious about data format. Use of free text fields should be limited as it can result in data that is hard to parse.

- **Adapt Recruitment Strategies Over Time**
 - How often will you review recruitment data to determine if adjustments in recruitment method are needed?
 - What would prompt you to implement new recruitment methods? How will you know when it is time to do this?
 - How will you gather feedback from participants or community members about your recruitment approach, so you can adjust as needed?
 - Consider conducting [Plan-Do-Study-Act \(PDSA\)](#) cycles or a more informal early analysis and team discussion to assess how initial recruitment efforts are progressing and plan for revised process as needed.

Resource List

- Two papers offer models of strategies for improving recruitment in research studies:
 - [Real-time evaluation and adaptation to facilitate rapid recruitment in a large, prospective cohort study \(2024\)](#)
 - This paper is a wonderful example of a study in which the team carefully tracked study recruitment outcomes, moving quickly to deploy solutions.
 - [Plan-Do-Study-Act \(PDSA\) for Evaluating Recruitment Efforts \(2024\)](#)
 - PDSA is a technique you can use to explore whether your recruitment approach is working, and how it may be improved. This paper describes how the study team meaningfully used several cycles of PDSA to understand how the recruitment process was working for their qualitative study.

Ali & Anne's top tip! *In the busy startup period, it's easy to forget about things like creating and testing data collection forms that will capture recruitment outcomes. Include recruitment tracking as a standing agenda item for your lab/study meetings or have standalone meetings focused on development of these systems and, once the study opens to enrollment, review of recruitment data.*

Recruitment Science

Discussion Questions:

- *What's an unanswered question you have about study recruitment? How could you attempt to investigate or answer this?*
- *If you were to share your recruitment and retention experiences (for past or current studies), whether informally or in a manuscript, what key insights or data would you include?*

If you're recruiting for a study, you know how much effort it takes and how challenging it can be. Recruitment science is the systematic study of this work, exploring how recruitment methods lead to different outcomes in terms of engaging, recruiting, enrolling and maintaining participants. It's important that all our work be guided by and contributing to the recruitment science knowledge base so that we're engaging in best practices. We recommend thinking of recruitment science as a knowledge generation cycle and recognizing that you should:

1. **Consult the recruitment science literature** to see what recruitment methods will work best for your study and population. UNC has constructed [literature searches](#) you can use to find recruitment science papers by topic or population and the RRRC can also assist. The [Online resource for Recruitment Research in Clinical trials](#) (ORCCA) site is a highly searchable and categorized database of over 6,000 recruitment and retention papers though it has not been updated since 2024.
2. **Contribute to the recruitment science knowledge base** by sharing your experiences and recruitment outcome data- more information on this below!

Share What You Learn

- How can you share insights from your recruitment and retention experience?
 - There are many ways to share this information. Consider writing a methods paper or giving a talk on your experiences or including key takeaways in poster presentations.
 - Network with those doing recruitment work similar to yours. Establish regular communication with these teams to informally share lessons learned and experiences. Connect with teams that are:
 - Recruiting the same or similar population
 - Using similar recruitment methods (e.g., if you are using digital flyers to recruit school-aged children, find other study teams who have done this)
 - Conducting similar study activities (e.g., if you're doing PET scans, connecting with other study teams doing this to discuss how they describe it to prospective participants, and what concerns people have about it)

Resources

- Our [resource library](#) includes examples of recruitment science papers.

Participant Compensation

Discussion Question: *What factors should guide your decisions about how much to compensate participants for their time and contributions? How can you balance fairness, ethics, budget constraints, and the potential impact on recruitment and retention?*

Key Considerations

- What is a fair and respectful level of compensation for participants, considering not only their participation in study activities but also indirect costs such as travel time or missed work?
- Are you offering reimbursement or support for expenses such as lodging, transportation (e.g., gas, public transit, rideshare, or shuttle services), meals, or childcare?
- How will compensation be provided, and is the method of payment suitable and practical for your study population? (For instance, checks may not be appealing to some participants)
- Do you need to budget for additional costs such as referral incentives or study swag?
- Are there other non-monetary ways to express appreciation and care for your participants?

Ali & Anne's top tip! Not budgeting enough for compensation or additional participant-related costs is a common challenge identified during RRRC consultations, and it's often difficult or impossible to adjust once the study is underway. Make sure to consider these costs in your initial budget.

Resource List

- [National Health Council Patient Compensation Tool](#): Fair-Market Value calculator can provide guidance on how to compensate patients who are involved in your research.
- [Ethical considerations for respectful research participant payment processes \(2024\)](#): This paper from the Journal of Clinical and Translational Science focuses on *how* we pay participants. The authors share practical ways to demonstrate respect for participants through your payment process. While we often focus on how *much* we pay participants, this paper makes a strong case for giving similar attention to the *method* of payment.
- [RRRC Resource Library](#): More compensation resources are available in our library, and we also maintain information on incentives provided by other study teams. Please reach out if you would like input on what to compensate your study participants.