

# Effective Approaches for Recruiting Hard-to-Reach Research Subjects

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04/03/2017



2017 Eastern Evaluation  
Research Society  
Conference

Absecon, NJ



# ICF's Experience in this Area

- **For over 45 years, ICF has conducted social science research for government, non-profit, and private sector clients**
  - We have worked for clients at the national, state, and local levels
  - We have expertise in recruiting for and conducting qualitative and quantitative studies
- **Headquartered in Fairfax, Virginia**
- **We have over 5,000 employees in more than 65 offices worldwide**
- **Content areas in which we work include:**
  - Education
  - Public health
  - Housing
  - Family self-sufficiency
  - Community development



# Overview of Session

- **Introduction: What makes a population hard to recruit?**
- **Two proposed methodologies:**
  - 1) Working with community-based organizations and/or local site recruiters
  - 2) Using online tools and social media
- **Questions and Discussion**

# Introduction: What Makes a Population Hard to Recruit?

Michael Long





## Context: Recruit Who for What, and Why?

- **This presentation is focused on strategies for recruiting participants for evaluation and research activities, which could include:**
  - Individual interviews
  - Focus groups or discussion sessions
  - Surveys (telephone, paper, or face-to-face)
- **Potential scenarios:**
  - You are evaluating a program that provides services to the homeless, and you are seeking to get feedback from that population about those services
  - You are working for a government agency that wants feedback from recent immigrants about what types of support would be most helpful to them
  - You are conducting research with low-income populations to inform the development of materials or programs for them

## “Traditional” Approaches to Recruitment

- **E-mail recruitment**
- **Face-to-face recruitment**
- **Flyers, handouts, postcards, etc.**
- **Working through research facilities with recruitment lists**

# Three Reasons that People Might Be Hard to Recruit

1. The population may be small or scattered.

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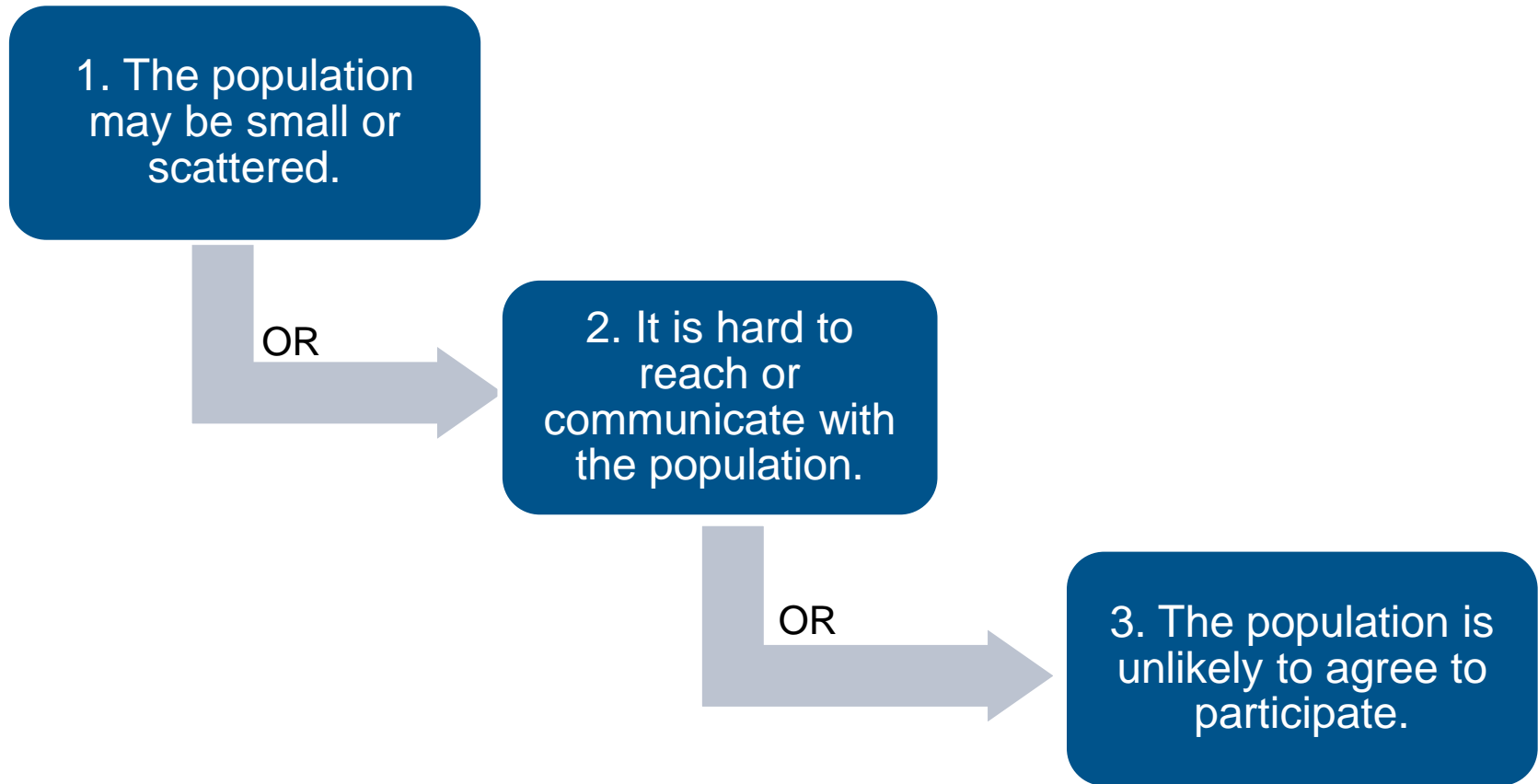
1. The population may be small or scattered.

OR

2. It is hard to reach or communicate with the population.



# Three Reasons that People Might Be Hard to Recruit





# Three Reasons that People Might Be Hard to Recruit

## 1. There may not be many of them

- People with rare diseases or conditions
- People with unusual characteristics (e.g., immigrants from a specific small country)
- People who meet a combination of criteria

## 2. They are difficult to reach or communicate with

- People who are geographically distant
- People who are difficult to reach through traditional means (e.g., by e-mail or phone)
- People in communities where evaluators do not have existing contacts
- People who speak a different language

## 3. They are unlikely to participate because of fear or distrust of evaluators

- People who might feel they have been mistreated by the sponsor of the research
- People who might fear legal repercussions (e.g., undocumented immigrants)

## Why is this important?: Potential dangers of ineffective recruitment

- **Low sample size: Danger that results will be based on only a small number of respondents**
  - Example: Focus groups have low turnout, so evaluators' findings are based on the views of only a handful of people
- **Selection bias: Danger that some portions of the population are underrepresented**
  - Example: Evaluators only collect data from people who show up to receive services, because they don't know how to reach those who stay home
- **Lack of recruitment fit: Danger that some or all respondents do not come from the target population**
  - Example: Evaluators are interested in collecting data from immigrants, but instead settle for talking to people whose parents immigrated

# Approach #1: Partnering with Community-Based Organizations and/or Local Site Recruiters

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## Background

- **This presentation draws on our recent experience recruiting participants for studies on topics such as:**
  - Financial attitudes and practices of low-to-moderate income (LMI) individuals
    - For example, we needed to recruit LMI individuals who used certain financial products.
  - Sensitive health questions related to HIV/AIDS transmission, teen smoking, etc
    - For example, we needed to recruit individuals who were open to describing intimate details about their personal lives.

# Defining a “Community-Based Organization” (CBO) and Local Site Recruiters (LSRs)

## ■ CBOS

- Locally-embedded in their community
  - Organize events, know community leaders
- Mission-driven
  - Often provide social services
- Examples:
  - Housing assistance organizations
  - Financial counseling organizations
  - Affinity or advocacy groups, such as local chapters of NAACP, La Raza, etc
  - Churches

## ■ LSRs

- Also locally-embedded in their community and passionate
- Examples:
  - Community organizers
  - Faith leaders



# Reasons to work with a CBO or LSR

- **Trusted in their communities**
  - Can help identify and recruit small and/or skeptical populations
    - For example, the CBOs we worked with were able to provide names and contact information of potential participants
- **Understand the local culture and politics**
  - They can explain and frame research in a way that resonates with target population
    - For example, we worked with LSRs who helped us understand how potential participants use financial products
- **Have strong local networks**
  - They can put researchers in touch with key influencers
    - For example, we have connected with faith leaders to help recruit participants
- **There may not be a professional research facility in the area, especially in rural communities**



# What CBOs and LSRs can offer

- **Access to *and* information on audience**
  - Information about the target audience of interest
  - Knowledge of local community/cultural events
- **Information sharing with target audience**
  - Ability to explain the project purpose and objectives to target audiences
  - Someone who is in person in a community answer questions from a population/be the “face” of the research
- **Link between audience and researchers**
  - Someone in regular communication with audience AND researchers
  - Real time information on recruitment efforts, challenges, barriers and needs
  - Frame research in a way that resonate with the community
  - Serve as an on-the-ground “fixer” by making reminder phone calls, finding facilities, etc





# Tips for identifying potential partners

- **Draw on your networks**

- For our project, we called on organizations who had been partners in past projects

- **Leverage local connections**

- CBOs usually know other organizations doing similar work.

- **Mine the literature**

- Examine the acknowledgements sections of other studies on similar topics

- **Ask your funder**

- The sponsor of the study may know organizations, such as grantees for other programs, technical assistance providers, etc



# How to convince CBOs/LSRs to help with the study

- **Explain how research findings may contribute to their work**
  - In our experience, CBOs desired to stay up to date on research in their field, and were excited to learn from our study
  
- **Describe how important it is to include marginalized voices in research**
  - In our experience, CBOs were enthusiastic about helping ensure that research reflected the input and experiences of marginalized population
  
- **Offer incentives to CBOs/LSRs, as well as research participants**
  - CBOs will likely be happy to help their constituents find an opportunity to earn a stipend
  - Offering the CBO itself a stipend can compensate for their time
  
- **Consider drafting a memorandum of understanding to spell out terms of your relationship...but keep it flexible.**



# Challenges and tips for working with CBOs/LSRs

- **Challenge: Following rigorous recruiting processes**

- CBOs and LSRs are generally practitioners, not researchers or recruiters.
- They can help recruit hard-to-reach populations, but may provide a biased sample, e.g., people who are most active with their organization

- **Tip: Use two levels of screening**

- Ask the CBO to gather expressions of interest and contact information, but professional research staff should apply more detailed screening
- Be prepared for more people to show up at the research site than actually passed the screening, especially if there is a stipend



# Challenges and tips for working with CBOs/LSRs

- **Challenge: Identifying an appropriate location**
  - CBOs may offer to “host” the research at their site, but this can give participants the impression that the CBO is sponsoring the research. You want to avoid the perception that the CBO has an interest in the outcome, and/or that participation or answers to the research may affect eligibility for services
- **Tip: Use a neutral site**
  - Consider booking a room at a library, community center, or senior center for a neutral location



# Challenges and tips for working with CBOs/LSRs

- **Challenge: Managing logistics during the research**
  - Professional research facilities generally provide front desk reception services, which can help check-in participants, making last minute reminder calls, and administering final screening. If you are at a neutral site, you will need to handle these functions on your own.
  - Professional research facilities also have staff to assist with room set-up, audio-visual equipment, etc.
- **Tip: Bring an extra person to handle logistics**
  - In our experience, it was valuable to have a person responsible for making reminder phone calls during the day of the focus groups, setting up A/V equipment, and greeting people at the facility.
  - Remember to bring water bottles, pens, and paper to the facility

# Approach #2: Using Online Tools and Social Media

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## Obar and Wildman (2015) on Social Media

To define “social media” for our current purposes, we synthesize definitions presented in the literature and identify these commonalities among social media services; They:

- 1) are (currently) **Web 2.0 Internet-based applications**,
- 2) **user-generated content** is the lifeblood of social media,
- 3) individuals and groups create **user-specific profiles** for a site or app designed and maintained by a social media service,
- 4) facilitate the development of social networks online by **connecting a profile with those of other individuals and/or groups.**”

# Social Media Channels for Audiences

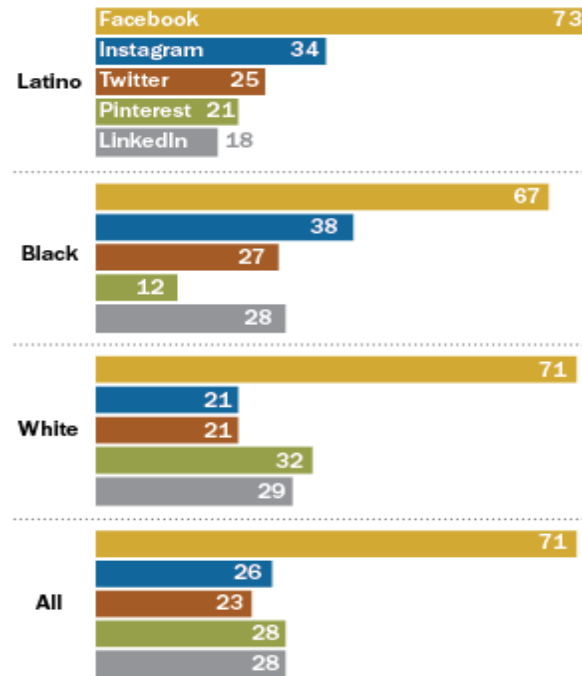




# Social media preferences vary by race and ethnicity

## Latinos and Blacks More Likely Than Whites to Use Instagram, Less Likely to Use Pinterest

*% of internet users who use each social media site, by race and ethnicity*



Note: Blacks and whites include only non-Hispanics. Hispanics are of any race.

Source: Pew Research Center's Internet Project September Combined Omnibus Survey, Sept. 11-14, 2014 and Sept. 18-21, 2014. n=1,445 internet users

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## Crafting an effective recruitment message

- Be attentive to your audience!
- Tell your reader your topic (e.g., nutrition)
- Tell them incentive right away
- Report who you are (e.g., CDC)
- Tell them what they will do (e.g., interview, focus group, survey)
- Use plain language
- Check reading level of message
- Direct them to online screener (include URL)
- Be direct and use few words!



## Pitfalls to Using Social Media

- Using the wrong social media channel
  - For example using Craigslist to recruit older people
- Lack of understanding of the social media channel
  - Some social media channels have particular lexicons
- Using complex language in a social media advertisement or online recruiting instrument
- Including too much information in social media advertisement or in online recruitment instrument

## Key Lessons Learned

- Social media channels are highly visible
- High reach recruitment instruments
- Low cost recruitment effort
- Offers multidirectional communication
- Affords a high level of anonymity
  - Good for recruiting *and* engaging youth and stigmatized HTR pops as these populations have high rates of using social media

## Key Lessons Learned

- Important to identify HTR population social media preferences
- Use more than one type of social media channel for recruiting
- Ask partners to link to your social media page or advertisement
- Use your personal network to share your social media page, profile, advertisement

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