TOOLKIT for Making Written Material Clear and Effective

SECTION 3: Methods for testing written material with readers

PART 6

How to collect and use feedback from readers

Chapter 14

How will you select and recruit participants?

U.S. Department of Health and Human Services
Centers for Medicare & Medicaid Services

TOOLKIT Part 6, Chapter 14

How will you select and recruit participants?

List of figures in this chapter:

This document is the fourteenth of 19 chapters in Part 6 of the *Toolkit for Making Written Material Clear and Effective*. The Toolkit has 11 Parts. It was written for the Centers for Medicare & Medicaid Services (CMS) by Jeanne McGee, McGee & Evers Consulting, Inc. The guidelines and other parts of the Toolkit reflect the views of the writer. CMS offers this Toolkit as practical assistance to help you make your written material clear and effective (not as requirements from CMS).

Introduction

This chapter covers how to set requirements for participation in your reader feedback sessions and find people who meet these requirements. In addition, this chapter will help you decide whether to schedule appointments for feedback sessions or recruit your participants on site for immediate participation in a feedback session. If you choose on-site recruitment, Chapter 15 gives practical tips on how to do it. If you decide to schedule appointments for your sessions, Chapter 16 offers advice.

The requirements you set and the process you use for recruitment may differ depending on whether you are recruiting intended readers or informants for your feedback sessions:

- **Intended readers**. These are people who represent the intended audience for the written material.

- **Informants**. These are people who are familiar enough with the intended audience and the topics covered in the written materials to give you insights and advice. Typically, they have close contacts with members of your intended audience, and are familiar with their language, culture, and traditions. Informants might include people in your own organization, as well as people from other organizations and community groups.

For one-time participation or multiple sessions?

This chapter focuses on ways of recruiting intended readers or informants to participate on a *one-time basis* in an interview or focus group. It's also possible to recruit people to be "on call" to participate periodically in sessions. **This alternative approach can save time and money in recruitment.** It works especially well for recruiting informants, but it can also be helpful when used with people who represent the intended audience of the written material.

Overview of tasks

To introduce the topics covered in this chapter, Figure 6-14-a outlines what is involved in selecting and recruiting participants for your feedback sessions.

Figure 6-14-a. Tasks involved in selecting and recruiting participants for feedback sessions.

Set requirements for participation

- **What characteristics do you seek in your participants?** How selective do you want to be? Do you need to set recruitment quotas to ensure a particular mix of participants?

Develop your recruitment strategy

- **Decide whether to set appointments or do same-day on-site recruitment**. Will you recruit people into sessions you schedule in advance, or will you recruit them on site to participate immediately?

- **Identify possible sources of participants**. What lists, settings, or other sources offer access to people who meet your requirements?

- **Decide what compensation and assistance you will offer, if any**. Will you pay in cash or offer other compensation? Will you offer help with transportation or child care?

- **Decide which methods to use for recruiting**. Will you contact people by telephone, in person, or by mail or e-mail? Will you send a letter in advance? Will you do reminders by telephone, mail, or e-mail?

- **Decide who will do the various recruitment tasks**. Which tasks will you do yourself? Will you hire a professional firm to do part or all of the recruitment? Will you get help from other organizations?

Recruit participants

- **Begin recruiting**. Develop a recruitment script, train recruiters, and begin recruiting. If you are scheduling appointments in advance, send a letter to confirm the appointment and give directions to the site.

- **Monitor progress**. Check frequently to see how well recruitment is going, and make mid-course corrections if needed.

- **Issue reminders**. To help ensure a good turnout, remind participants a day or two before the session.

Source: Created for this Toolkit.

Setting requirements for participation

What types of requirements might you set?

To get meaningful results from your feedback sessions, you need to select the participants carefully. Usually, you want to find participants who are reasonably representative of the intended audience for the written material.

Early in your planning process, start thinking about what requirements to set for participation. Later, when you are actively recruiting, you will be checking to see whether prospective participants meet the requirements you have set. Researchers call this “screening” people to see if they “qualify” as participants by meeting all of the requirements you have set.

The requirements you set depend on the material and your goals:

- **Some requirements may be based on demographic characteristics**. For example, if you want readers’ reactions to a folder about prostate cancer screening that has been tailored for African Americans, your requirements might include age (such as, 50 or older), sex (male), and race (African American).

- **Other requirements may be based on people’s attitudes, behaviors, experiences, or circumstances**. For example, if you want to get readers’ reactions to a post card that tells about a tobacco quit line, you might decide to restrict participation to smokers who say they want to quit. If you are recruiting people to give their reactions to a website, you may want to restrict participation to people who are accustomed to using their computer to visit websites.

- **Basic reading skill is one requirement that always applies** when you show written material to people in an interview or focus group and ask for their reactions. We discuss this requirement below.

Recruiting people who can read the materials you show them

When you are recruiting people to give reactions to written materials, it's vital to be sure that the people you recruit can read. If you show written materials to a non-reader or a person with limited reading skills, it puts them in a potentially humiliating situation, as well as making it hard for you to get the reactions you need.

Even though reading skill is a requirement for participation, you will not have to screen for this skill in all situations. For example, if you are doing focus groups or interviews with people whose work requires reading skill, such as health professional, you can assume that the requirement is met.

However, if you are recruiting from any broad cross-section of people, including people with Medicare or Medicaid, it can be risky to presume that everyone you recruit will be able to read. Figure 6-14-b below has suggestions for tactful and practical ways to check on people's functional reading ability.

Figure 6-14-b. Tips for recruiting people who will be able to read the material you show them.

Asking people directly, "can you read?" is **not** a good way to screen for reading skills

In our culture, inability to read tends to be a source of shame. Many adults with limited reading ability are reluctant to admit it. If you ask them, "can you read?" you put them on the spot and may cause embarrassment or concealment (Willard; AMA, 2007; Doak, Doak & Root, 1996; Osborne, 2004).

Moreover, the question, "can you read?" is vague. Someone with very limited proficiency could interpret this question as asking, "can you read *at all* - even if only a little?" and answer "yes." But if you showed them your written material in a feedback session, they would struggle to read it.

Instead, make the need for reading skills very clear and give people an easy way to refuse

- **Make the reading task very clear.** When you are screening participants, explain that the interview involves reading the written material and giving their reactions. To emphasize the need for reading skills, you can mention that the interview might require reading some of the material aloud. Raising this possibility during screening allows people who feel shaky about their reading ability to know what is expected, and gives them an opportunity to say no.

- **Give the person an easy and face-saving way to say no to the interview**. After you explain and emphasize that reading is required, you can ask, "Does this sound like something you might want to do?" You will preserve people's dignity by giving them an easy way to say no without putting them on the spot to tell *why* they are saying no.

- **Keep in mind that some people with good functional reading ability may have trouble seeing the material well enough to read it**. For example, they may need reading glasses or large-print materials. You can include reminders, such as "Remember that this interview will involve a lot of reading. Be sure to bring reading glasses, if you use them."

Consider recruiting participants from local adult basic education classes

In other parts of this Toolkit, we discuss how to match the reading level of your material to the reading skills of your intended audience (see Toolkit Part 4, *Understanding and using the "Toolkit Guidelines for Writing"*). We also discuss the serious limitations of using readability formulas to assess your materials (see Toolkit Part 7, *Using readability formulas: A cautionary note*). We urge you to rely on feedback from readers as the ultimate test of whether material is easy for people to understand and use.

For most projects, knowing that the people you recruit have basic functional reading skills is enough. In some situations, though, you might want to find out whether people with a specific level of reading skill find it easy to read and understand the material. For example, the material might be written for people with *very limited* reading skills, or you might want to verify that the material is easy for people with average reading skills. If you need to interview people with a defined level of reading skill, consider contacting the adult basic education reading programs in your community. Teachers in these programs can help you identify which classes have students with the reading skills you are seeking, and they can tell you what you must do to get access to the students for recruitment purposes. (Teachers in adult basic education programs are also excellent resources for expert review of written material.)

But what if you *do* happen to recruit someone who can't read?

Careful screening of participants will usually prevent the awkward situation of recruiting someone who cannot read. But just in case this happens, we give tips on how to handle it in Chapter 18 on interviewing technique. In this chapter, see Tip #7 and *Figure 6-18-e, What should you do if the participant is unable to read the material?*

Source: Created for this Toolkit.

Special considerations apply to recruitment of focus group participants

In general, focus group discussions tend to work better when group participants have a lot in common (Krueger & Casey, 2000; Morgan & Krueger, 1997). When people sense that they have things in common with others in the group, they tend to feel more comfortable about speaking up. The group is also less likely to get sidetracked from the main topic into discussions that emphasize the differences among them.

When you set requirements for focus group participants**, be alert to differences in status, culture, circumstances, or other factors that may affect the ease and candor of group discussion**. It's often wise to keep group participants fairly similar with respect to age, sex, social characteristics, and any characteristics that you expect will strongly affect how they react to the written materials. For example, mixing people who are highly educated with people who dropped out of high school is likely to inhibit those with less education. As another example, if some participants have Type I diabetes and others have Type II diabetes, they might tend to spend more time pointing out their differences than discussing what they have in common. Mixing people who have had Type I diabetes for years with others who have recently been diagnosed with Type II diabetes runs the risk of diverting attention away from the written material as people point out the impact of the differences in their experiences with diabetes.

This same caution to recruit group participants who have a lot in common also applies when you are doing focus groups with informants. If your informants have different types of knowledge about your intended readers, it would be best to schedule separate groups so that each group is free to get into a detailed discussion of its particular experiences and insights. For example, suppose you want feedback from informants on a booklet that helps older people and their families choose a nursing home. You might want to hold separate focus groups with discharge planners, nursing home inspectors, and geriatric social workers, since each of these groups is likely to emphasize a different perspective on your topic. Another option would be to conduct individual interviews rather than focus groups.

How selective do you want to be?

As you set your requirements for participation, consider what you hope to accomplish with the feedback sessions, in order to decide how selective you want to be:

- If you are doing sessions with intended readers, your goal may be to get reactions from **people who are a reasonably representative cross-section of the intended audience for the written material**. In this case, you can simply set the requirements for participation to match the main characteristics of the intended audience.

- **In some cases, there may be good reasons to be more selective about who you recruit to your sessions**. Instead of recruiting participants who represent a broad cross-section of the intended readers, you may want to recruit **people who represent a particular subgroup** of the intended readers. Here are two examples:

  - Suppose that you have developed several versions of a poster that encourages people with Medicare to get a flu shot and tells where shots are available. You are going to get people's reactions to these posters in a focus group, and are trying to decide what requirements to set for participation in the group. One option is to recruit a cross-section of people with Medicare, but many of these people routinely get a flu shot. If you want to get the most informative feedback about a poster's ability to persuade people to get a flu shot, you would do better to recruit people with Medicare who seldom get flu shots.

  - Suppose that you are revising a pamphlet because you have heard that it's hard to understand. You may want to recruit people with limited reading skills for your sessions, even though the pamphlet is distributed to the public. By focusing your sessions on getting reactions from people who are less-skilled readers, you are likely to get more insights into what makes the pamphlet hard to understand, and what kinds of changes might help.

Should you set quotas to ensure a particular mix of participants?

As you develop your recruitment strategy, think about whether you need to use recruitment quotas:

- If you recruit **without quotas**, it means that once you start recruiting, you will take anyone who meets the basic requirements you have set for participation, until you have successfully recruited as many participants as you need. In practice, recruiting without quotas means that you will tend to recruit the people who are the *easiest to recruit* among those who meet your requirements. This may or may not be problematic, depending on the project.

- If you recruit **with quotas**, it means that you are imposing rules to ensure that you will recruit a particular mix of respondents who meet your basic requirements. For example, suppose that your goal is to recruit a racially diverse group of participants who (a) have Medicare and (b) are 65 to 75 years old. If you think it may be hard to recruit Asian-Pacific Islanders who meet these requirements of having Medicare and being 65 to 75 years old, you may want to set a quota to ensure that you include them among your interview participants.

Quotas can be flexible or exact. For example, if you are recruiting 20 participants for individual interviews, here are two common ways you could set a recruitment quota for Asian-Pacific Islanders:

- **By specifying the exact number of people to be recruited**: "Of the 20 people to be recruited, recruit 3 who are Asian or Pacific Islander."

- **By specifying an acceptable range:** "Of the 20 people to be recruited, recruit *at least* 3, but *no more than* 5, who are Asian or Pacific Islander."

You could also specify *only the minimum number* to be recruited, or *only the maximum number*, but these ways of setting quotas offer less control over the mix.

Imposing quotas can be very helpful, but it also makes recruitment more complicated and may add to the time and expense. You will want to think carefully about how important is it that you recruit a particular mix of people, and what mix you are likely to get if you don't use quotas. Does it seem likely that certain types of people will be much easier to recruit than others? If so, would this cause a problem for your project?

Since, as we noted earlier, focus group discussion tends to work better when group participants have a lot in common, you should take special care in setting recruitment quotas for any particular mix of participants within a group.

If you need to be sure certain types of people are represented in your feedback sessions, and these people are a diverse mix, it may be better to do interviews rather than groups, or to hold several groups, each with a different type of participants.

How will you find participants who meet your requirements?

Will you schedule appointments in advance, or recruit people on site for immediate interviews?

Once you have set requirements for participation in your sessions with readers, the next step is to find people who meet these requirements. The way you find participants depends in part on whether you schedule appointments in advance or wait to recruit people on site:

- **The most common approach is to schedule your sessions in advance.** When you schedule in advance, recruitment consists of screening potential participants until you fill all of your sessions with people who meet the requirements. For more on this topic, see Chapter 16, *Tips for recruiting people by telephone to set appointments for feedback sessions.*

- **If you are doing individual interviews, same-day on-site recruitment is less time-consuming and less expensive than recruiting in advance**. Same-day on-site recruitment means that you go to the setting where you will conduct the sessions and recruit people who happen to be there. This approach is often called "intercept interviewing," because recruiting is done by approaching – or "intercepting"—people who happen to be at the setting that day, to see if they meet the requirements and can spare the time to participate in a session. This approach works very well for individual interviews. Sometimes it can work for very small groups of two or three people, but it is not practical for recruiting participants for a focus group. For more about this approach, see Chapter 15, *Tips for recruiting people on site for immediate participation in a feedback interview.*

Once you have decided whether to recruit in advance or do on-site recruitment, the next step is to identify possible sources of potential participants:

- *If you are recruiting in advance*, start by looking for lists, settings, organizations, or other sources that might serve as a starting point for recruitment.

- *If you are going to do on-site recruitment*, your next step is to identify sites that might provide easy access to the type of participants you seek. (We discuss the issue of choosing sites for on-site recruitment in Chapter 13, *Choosing a location for your feedback sessions*.)

Is a list available?

If you are scheduling your sessions in advance, working from a list of possible participants can make the recruitment process much more efficient and cost effective. There are many possible sources of lists. These include organizations that are part of your project team or serving as advisors or informants. Professional research firms are another option, since most of them maintain a database used for recruitment purposes. If you are doing a project for Medicare, Medicaid, or the Children's Health Insurance Program, the government agency may give you access to lists with contact information. Of course, there will be data use agreements that tell the requirements and procedures you must follow to protect the confidentiality of the personal information in the lists.

Whatever the source of your list, be sure to ask how the list was compiled, and about the characteristics of people on the list. Also, find out whether the contact information for people is complete and up to date, and whether it is in a database format that would allow you to pre-select a subgroup of people based on age, zip code, or other characteristics. The more you know about the list, the better you can judge how well it will meet the needs of your project as a convenient shortcut for recruiting the types of participants you need.

If you are using the database maintained by a research firm, keep in mind that these databases often consist of people who have participated in previous projects done at the firm or who have responded to advertisements for volunteers to participate in studies for pay. While the resulting database is not a cross-section of the public, it may be suitable as a source of participants for your project. One advantage is that you may be able to identify a subset of people in the database who meet at least some of the requirements you have set for participation in your reader feedback sessions. For example, suppose that you need to recruit parents of young children for interviews to get their reactions to written material about the Children's Health Insurance Program. If the firm's database includes a list of parents who were in focus groups that did product testing of diapers and toddler toys, this list might be a good source for recruiting parents to your sessions.

What settings or organizations might be good sources?

If lists are unavailable or unsuitable, you will need to find other sources of potential participants:

- *If you are scheduling sessions in advance*, you will be searching for agencies or organizations that can give you direct access to potential participants or put you in touch with a suitable source, or settings that give you access to potential recruits.

- *If you are doing on-site recruitment*, you will be searching for a suitable setting that will give you access to people on the premises as well as space in which to conduct your sessions.

Keep in mind that **many projects use more than one source for recruiting their participants**. Where to look for a suitable setting or for assistance with recruitment depends on the type of participant you seek. For example, if you are doing a Medicare project, you could contact local area agencies on aging, community organizations that serve older adults, or senior housing facilities. If you are seeking young mothers with low incomes, you could try contacting Head Start, WIC (women, infants, children) programs, or other agencies and organizations that serve this group.

There are many possible settings to consider, including various types of community-based organizations, public and private agencies, and commercial research facilities. Depending on the needs of your project, settings could include community education programs, meeting rooms at a public library or community education center, conference rooms or break rooms at a worksite, schools, churches, day care centers, service organizations such as the YWCA or Goodwill, public health clinics, medical or dental offices, or hospitals.

If you have trouble finding a suitable source of potential participants, try to think creatively. Brainstorm with the project team, sponsors, and other stakeholders or informants about resources in your community that have a connection with the topics addressed in the written materials or the audience you are trying to reach. Think about places where the intended readers tend to congregate. Consider placing notices on bulletin boards or advertisements in community newspapers.

How many participants do you need to recruit?

Recruiting extra people to guard against no-shows

Another part of this Toolkit gives guidelines to help you decide how many interviews or focus groups you need to do, and discusses how many people to include in a focus group (see Chapter 6, *Should you do individual interviews or focus groups?*). When you are planning your recruitment strategy, take into account that some of the people you have scheduled for an interview or focus group may not show up. Sending confirmation letters and making reminder calls will help, but illness, bad weather, and other unpredictable events can interfere with a good turnout. It is often wise to recruit a few extra people, just to be sure that you end up with enough participants.

If you are doing focus groups, it is standard practice to over-recruit. Recruiting a few extra people – just in case – will allow you to start the group on time and ensure enough participants for a good discussion. If there are many no-shows, the group will be too small, and if people arrive late, it causes problems, too. Delaying the start of a group is undesirable, since it cuts the time short. Adding late arrivals after the group is underway is also undesirable, because it would be disruptive and force the moderator to repeat things that others have already heard.

To decide how many extras to recruit, think about the minimum number of participants that would be acceptable, and make your best guess about the number of no-shows you expect. Keep in mind that when you over recruit for a group, you must be prepared to pay everyone who shows up, including those you must turn away politely because they arrived a little late or because the group was already at maximum size.

If you are setting appointments to do individual interviews, you can recruit extra people called "floaters" who agree to stand by as possible substitutes. Floaters are people who agree to come in for a specified period of time (generally a couple of hours), and wait to see if they are needed for an interview. You promise to pay them for being on call in this manner. If someone fails to show up for an interview, you can use the floater as a substitute. You can also use the floater as a substitute if you need to cut an interview short for some reason. It's appropriate to pay floaters a bit more than a regular participant, because you are asking them to stay available on the premises for a longer period of time. When you recruit a floater, it's important to be clear about their on-call role as possible substitutes, and to assure them that they will be paid as promised, whether they participate or not.

It costs more to recruit floaters, but if your budget permits, having floaters available can be helpful in some situations. For example, if you have a tight schedule of interviewing, and it's important that you complete most or all of the scheduled interviews, consider recruiting a morning and afternoon floater for each day of interviewing. Another option is simply to schedule a few more interviews than you think you really need, rather than pay extra to have floaters available. If all people show up for their interviews, that's fine. If not, interviewers can use the extra time to debrief with one another, to review and enhance their written notes from previous interviews, or to take a longer break between interviews.

What compensation and assistance will you offer?

Cash payments and other types of compensation

It takes time and effort for people to give you their reactions to written materials in an interview or group discussion. Give them some type of compensation, if you can, to encourage them to show up and to thank them for their trouble.

Cash payment is the most common. It is hard to provide specific guidelines about how much to pay, because amounts can differ greatly by type of participant as well as length of the session. There are also regional variations, and rates tend to be higher in big cities than in smaller towns. You want to pay an amount that seems reasonable and attractive to participants, but is not excessive. For example, in some situations, feedback projects are reviewed in advance by a human subjects protection review panel that protects the interests of your participants. The panel scrutinizes the project design and materials, including the amounts you propose to pay participants. If the cash payments seem disproportionately high, the panel may consider them to be coercive, exerting undue pressure on people to participate.

To establish an appropriate amount for cash payment, consider the type of participant and what you are asking of them, and check into local practices. It can be especially helpful to get advice about payment amounts from community-based organizations.

Cash payment is inappropriate or prohibited in some situations. Generally, you cannot offer cash payment to employees who participate in sessions on company time. If your participants are government employees, check into any additional rules that may apply. Even in situations where you cannot offer cash payment, it may be possible to offer other types of compensation, such as refreshments, meals, gift certificates, or modest gifts. Check into rules that may apply and get advice about appropriate incentives from your informants or local organizations in the community.

If you are doing sessions with people who have Medicaid coverage or other income-based programs, be especially careful about compensation. In some situations, cash payments to people with Medicaid can jeopardize their continued eligibility for the Medicaid program. A gift certificate may be an acceptable alternative; check on the state government rules. To make it convenient for your participants, give gift certificates to a grocery or variety store that has many stores in the local area. Be sure to ask ahead of time if the store will buy back any certificates you don’t use.

Offer help with transportation and childcare

If you can, consider offering to help with transportation. Getting to the site where sessions take place can be a major barrier to participation, especially for people with low incomes, older people, and those with health or physical limitations. Offering assistance that removes this barrier will help with recruitment and result in a better cross-section of participants who meet the requirements you have set.

If you offer help with transportation, there are several ways to do it. One is to pre-pay or reimburse the cost of bus fare, cabs, or parking. Another is to arrange and pay for the cost of cabs or specially-equipped medical vans to pick up participants, bring them to your site, and return them to their homes after the session is complete.

If you offer to help participants with childcare, the easiest way is to reimburse them for babysitting expenses. It can also work well to hold your sessions at a location that has an on-site childcare facility. Generally, it’s not wise for a project to provide childcare directly: arrangements can be time-consuming and complicated, and legal liability is an important issue.

Deciding which recruitment methods to use (telephone, in person, mail, e-mail)

When you are recruiting people in advance for sessions, you can telephone them, approach them in person, or send them a letter or e-mail message. Which approach works best depends on your project and the type of people you are recruiting. You may need to use a *combination of approaches*. For example, you may decide to send a letter in advance to explain your project, and then follow-up with a telephone call. It's also possible that you will want to use one method for the initial contact with prospective recruits, and a different method to give them a reminder just before the session.

Using the telephone for recruitment

If you have names and phone numbers, telephoning is a very common way to recruit participants. If you decide to recruit by telephone, keep in mind that it can be time consuming and frustrating work. It helps to have a long list of names, with phone numbers that are up to date. Even so, getting through to some of the people on your list may require many attempts at different times of the day or evening, and on different days of the week. Some participants, such as Medicaid enrollees, can be hard to recruit by telephone because phone numbers are often out-of-date or unavailable. Some other groups can also be hard to reach by telephone, such as people who screen their calls. As we discuss below, it can sometimes help to send a letter in advance to explain about the project and alert people that you will be calling.

In-person recruitment

Recruiting people in person can work well, and it may be more culturally appropriate than telephoning for some types of participants you wish to recruit, such as people with limited English proficiency who will be interviewed in their native language.

Many sites that are suitable for same-day on-site recruitment also work well for in-person recruitment when you are setting appointments in advance. You would follow the same methods for approaching and screening people, but instead of asking them to participate in an immediate interview, you would set up appointments for a session to be held at a later date. These sessions could be held at the same site where you recruit the people in person, or at a different site.

Much like telephone recruitment, in-person recruitment can be quick and easy, or it can be time-consuming and difficult. If you can find settings where the types of people you are seeking tend to congregate, in-person recruitment can be the most cost-effective and efficient method to use. In-person recruitment can be especially efficient if you are able to do it in a group setting rather than approaching people one at a time. For example, perhaps an instructor in an adult basic education class or patient education class would allow you to make your pitch to the entire class at once. The instructor's consent helps establish the legitimacy of your project, and the dynamics of group recruitment often encourage people to participate.

Recruiting by e-mail

For some types of projects and participants, e-mail can be a very easy and efficient way to recruit participants for feedback sessions. This method might work well for recruiting professionals who are accustomed to communicating with colleagues by e-mail.

Recruiting by mail

Letters and postcards are generally used in combination with other methods for recruitment. For example, letters are sometimes used to alert people in advance that someone will be calling about possible participation in a feedback session, and they are often used to confirm appointments. Letters or postcards are also used to remind people about their appointments.

Deciding who will do the various recruitment tasks

What's involved in recruiting participants depends on whether you are making appointments in advance or recruiting on site:

- **If you are recruiting participants for sessions that you schedule in advance**, as most projects do, there are a number of tasks involved. These typically include developing a recruitment script, training the recruiters, contacting and screening potential participants, keeping records of appointments, preparing and sending confirmation letters, and making reminder phone calls a day or two before the session.

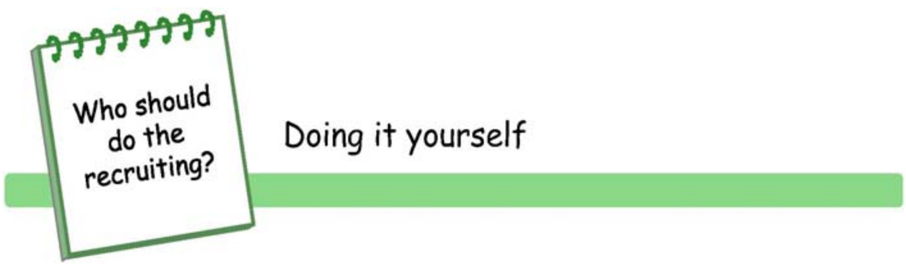
- **If you are recruiting participants on site,** the recruitment process is shorter, simpler, and can be much less expensive. You will need to arrange to use your chosen site, prepare a script, and train the recruiters and interviewers, but the other tasks related to scheduling and confirming appointments don't apply.

Do it yourself or get help from others?

There are three main ways to handle the various tasks involved in recruiting participants for a feedback session. You can do it yourself, hire a professional research firm, or enlist help from another organization, such as a community organization that has access to the type of participants you are trying to recruit.

As shown in Figure 6-14-c below, each of these approaches has advantages and disadvantages. You will need to weigh these tradeoffs as they apply to your particular project. You may want to handle some of the tasks yourself, and get help with others. Keep in mind that sometimes the people who recruit the participants are also the ones who conduct the feedback sessions, especially if you are recruiting in person at a site.

Figure 6-14-c. Should you handle recruitment yourself, hire a firm to do it, or get help from other organizations?



Advantages

Cost savings, compared to hiring a professional firm to do it.

Disadvantages

If you recruit in advance to set appointments, and you have never done this before, it's easy to underestimate the amount of time and effort it can take to make preparations, contact and screen people, confirm appointments, and make reminder calls. Do you have staff who have the necessary skills, and who will be able to make these tasks a priority during the period of active recruitment?

Comments

If you are recruiting on site for immediate participation in interviews, the same person or team of people typically handles recruitment along with interviewing and note taking. If you are handling all of these tasks yourself, rather than hiring others to do them, this is generally the most cost effective way to collect feedback from readers.

Who should do the recruiting?

Hiring a professional research firm

Advantages

When you use experienced professionals to do the recruitment for you, the advantages include ease, convenience, and skill. You would still need to do some preparation and monitoring, of course. The firm may have a recruitment database that suits your needs, and it can provide helpful advice and a good reality check on how long it might take to recruit people.

Disadvantages

Higher cost -- possibly very much higher.

Who should do the recruiting?

Getting help from other organizations

Advantages

Getting help with recruitment from community-based organizations may give you better access to potential participants as well as assistance from people who are familiar with the group you are recruiting from.

Disadvantages

It takes time and effort to coordinate your plans with other organizations and monitor their progress once recruitment is underway. You will need to coach them on how to handle the recruitment. Your project may not be a priority for the other organization, and you will have less control over the whole process compared to doing it yourself or hiring a firm to do it for you.

Comments

If other organizations offer to help, make sure that they can devote the necessary time and labor to doing the job, within the critical time period, and that you agree about the basic goals and process to be used in recruitment. Cost can differ greatly. If the groups that help you do not charge for their assistance, consider offering a donation as a thank you. Another possible approach is to pay a fixed amount for each person who is recruited and shows up for the session.

Source: Created for this Toolkit.

Using a recruitment script ("screener")

Whether you decide to do the recruiting yourself, hire professionals to do it for you, or get help from other organizations, you will need to prepare a recruitment script for use by those who contact prospective participants. Researchers usually call this recruitment script a "screener" because it includes the screening questions that check on whether people meet requirements for participation.

Some recruitment scripts are just a general guide about what to cover in a phone call or in-person recruitment conversation, but many give the specific wordings to be used, as suggested by the term, "script." Rather than leaving it up to recruiters to decide what to say, we strongly recommend that you develop a detailed recruitment script with specific wordings:

- **To work well, the script must be flexible and sound like natural conversation.** Even when a script includes exact wordings, the recruiters who use it will need some latitude to adapt the wording to suit a particular situation.

- **Having a good script to follow makes it much easier for people to do a good job of recruiting**, especially if they are not experienced in recruiting people to participate in interviews or focus groups. Without a script it can be hard to improvise effective wordings and to remember to cover all of the information in the right order.

- **Having a good script is an important tool for quality control**.

    - A recruitment script helps standardize the process of recruitment. It helps ensure that the people you recruit really do meet the qualifications you have set, and that they understand what is involved in agreeing to participate in a session.

    - Producing the script forces the project team to think through what needs to be said, and find the best ways to say it.

- A well-written script makes a good impression: it establishes a friendly tone, covers the basic information in a clear and simple manner, and moves from one topic to the next in a logical order. For example, you will want to find out whether people meet the requirements for participation before you invite them to participate and mention the amount of payment.

In later chapters we tell how to prepare a recruitment script for two common types of recruitment situations: a script to use when you are recruiting in person (Chapter 15), and a script to use when you are recruiting by telephone for sessions that you are scheduling in advance (Chapter 16).

Training and monitoring the recruiters

The way you handle recruitment is important, because it is your first contact with potential participants and sets the tone for your sessions with them. Be sure that the recruiters are well informed and well trained, so that they can give a clear explanation of what the project is about and let prospective participants know how much you value their time and opinions.

If you use a professional firm, they will handle the training and supervision of recruiters, but it's up to you to provide the background information about the project and a good script to follow.

If you are doing recruitment on your own or with assistance from another organization, it's important to sit down with the people who will be doing it to go over the written script and procedures they are supposed to follow:

- **Make sure that they really understand the requirements and the reasons behind them**. Otherwise, they may recruit the people who are easiest to recruit, or the people they know would especially benefit from getting the payment you are offering.

- **Make sure that they understand the importance of following the script** when they call or approach people in person to talk about the project.

- **Work with them to develop forms for keeping track of the process and results of their recruitment efforts.**

- **Once recruitment is underway, monitor it closely** to help recruiters handle any problems that come up and verify that the right mix of people is being recruited.

End notes

CMS joins Toolkit writer Jeanne McGee, PhD in thanking colleagues who shared their experiences, reviewed early drafts of this and other chapters of the Toolkit, and offered many helpful ideas, examples, and suggestions for improvement. See acknowledgments at the end of Toolkit Part 1 and Toolkit Part 6, Chapter 1.

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