

Recruitment for Qualitative Research

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Introduction

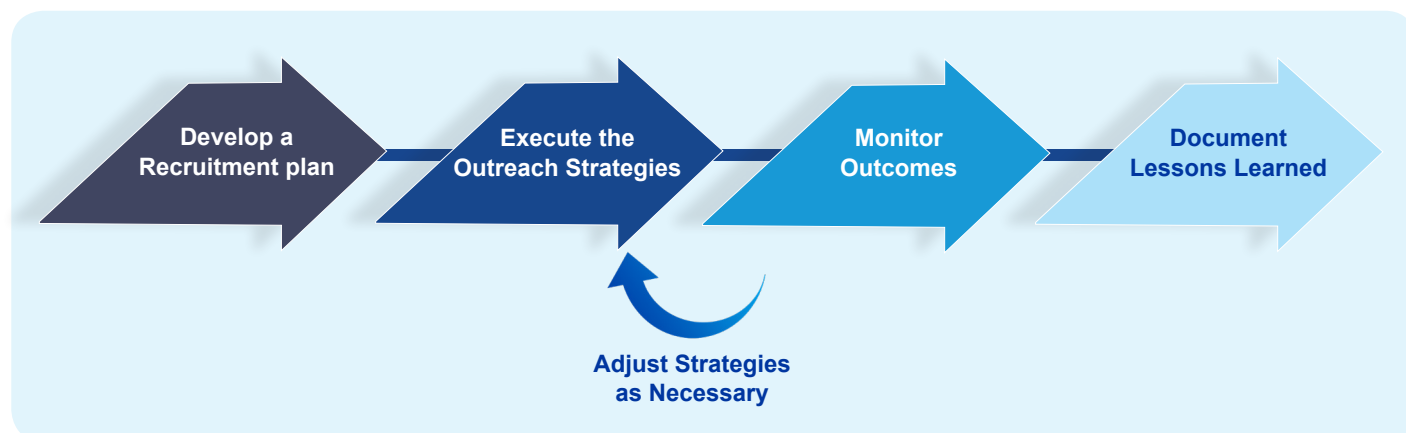
People who are willing to share their experiences, opinions, and thoughts are key to most qualitative research studies. It is our job as researchers to reach out, connect, and inspire people to participate in our research, whether these people provide data on behalf of themselves or on behalf of a group or organization they represent; these firsthand experiences and stories ultimately drive decision making. Recruiting participants from populations of interest is key to upholding the integrity of the research effort and ensuring accurate conclusions.

Econometrica's team of skilled qualitative researchers excels at organizing and executing recruitment efforts to engage a diverse pool of individuals willing to participate in our research. This paper explores multiple recruitment strategies and how they work. These strategies are focused on recruiting individuals from the general population and can be tailored to recruiting individuals from a specific population subset (e.g., hospitalists). We focus on techniques that may be broadly applied across a variety of research endeavors. Our approach is dynamic and designed to be responsive to different types of target populations.

Our Approach

To build a diverse pool of participants, we utilize free and paid digital and traditional recruitment methods that seek to target participants through different strategies. Figure 1 depicts the process flow for recruiting research participants.

Figure 1. Recruitment Process Flow



Econometrica first develops a plan that accounts for the unique needs of the research project and considers how to best target the populations of interest. Staff members execute the recruitment strategies and monitor outcomes through regular status checks that track the progress of recruitment. Our continuous monitoring allows us to adjust recruitment methods as necessary; in our experience, this has allowed us to save time and money by pivoting our resources to the most successful methods, adjusting our staff's attention to specific populations that require further outreach and adding innovative strategies over time. The following sections discuss how Econometrica has implemented recruitment plans in the past for qualitative research studies. We provide many of our experiences with recruiting from the public, but we also have experience recruiting individuals that represent hospitals, community organizations, or employers.

Planning

Econometrica's first task is to understand the needs of the client and their research, which includes the demographics of the desired recruitment pool, the number of participants needed, and what makes this population of interest for the research. Our clients often seek to reach individuals who represent specific industries or have specific characteristics (e.g., racial, ethnic, gender, and/or socioeconomic characteristics) and/or experiences (e.g., working experiences, life experiences). Through discussions with our clients, we help identify if there are additional considerations for the target population based on the research questions and scope of work (e.g., geographic location of participants).

Once we define the characteristics of the people we are doing research with, we create recruitment goals for each category of interest and consider how the sampling approach will affect outcomes. For example, while convenience sampling may be appropriate for some projects, quota sampling may work best for others. We make recommendations for recruitment methods to our client and discuss the reasoning behind these recommendations. We identify the strengths and weaknesses of our recommended approaches, including why we think they are the best and most cost-effective ways to meet the needs of the project and how we will accommodate or address any weaknesses. For example, online recruiting is often low cost but does not reach those that may have low computer literacy or access to the internet. We can address this by working with nonprofits that work with low-literacy communities to spread the word of our study opportunity and by incorporating additional strategies, such as distribution of hardcopy flyers, into the recruitment plan or using the networks of recruited participants to gain access to their friends and family.

Implementation

Once the sampling strategy and specific targets have been established, we begin outreach. Figure 2 outlines the implementation of our recruitment process. We describe the processes of developing recruitment materials and the various outreach tactics we employ in further detail below.

Figure 2. Participant Recruitment Process



Development of Materials

Econometrica develops a host of branded materials for recruitment, including outreach materials, participant screening surveys, and email and appointment scripts. This ensures that the recruitment process is consistent and branded.

Outreach Materials: Econometrica designs our recruitment flyers, advertisements, and social media posts to appeal to and reflect members of the target population(s) of interest in our research. Our in-house Graphics Department designs materials with one set of text but varied images to create diverse materials at no additional cost. The images, such as those shown in Figure 3, feature individuals of different genders, ages, and races to attract people across demographic groups. If needed, we use our diverse staff or translation services to communicate to audiences that may be less inclined to respond to English advertisements.

Figure 3. Sample Outreach Materials



All materials contain text that captures key pieces of information about the study. They typically outline the necessary qualifications and highlight incentives for participation (e.g., gift cards, cash, intrinsic motivators). We use images and bolded language for the most critical aspects of the participation qualifications and incentives to encourage responses from the target populations. Our normal recruitment efforts include a call-to-action for respondents to complete an online participant screening survey using a shortened URL or to call Econometrica.

Participant Screening Survey: Econometrica often authors a screening survey for interested individuals to complete. It contains a series of questions to determine eligibility and collect demographic information. This survey ensures that we select participants for our research that match the specific characteristics in which our client is interested. The survey can

be administered by Econometrica employees or completed online by potential participants themselves. To drive down cost, the online screening survey is hosted on a platform such as Google Forms or Qualtrics.com. We brand the survey to appear consistent with the recruitment materials. The survey also allows us to report on differences between the group of individuals who initially responded and those who participate in the final survey or program.

Scripts: Econometrica drafts scripts for emails, appointments, and calls. These scripts ensure that staff collect consistent and complete information from potential and actual participants. They also ensure that participants receive complete and consistent information about the research (e.g., ensuring that the location of the interview is included, providing information on personal or public transportation options to get to the location, and providing contact information for the research director).

Outreach Approaches

We typically launch recruitment through a social media campaign on Econometrica's company accounts across Twitter, Facebook, Instagram, and LinkedIn. If the study targets individuals in the greater Washington, DC, area and snowball recruiting is appropriate, Econometrica employees may share the posts to their personal social media pages across the various channels, which helps increase the visibility of the advertisements to a broader audience. Images are posted daily at first and then every few days during the recruitment period.

Another main channel for recruitment is Craigslist, which has proved to be highly effective in bringing in survey responses. Free advertisements may be posted in the Community section under the General and Volunteers pages. Expanding the reach of the advertisements across multiple categories helps reach a larger range of people. In addition, low-cost paid ads in the Gig Offered section are effective. Posting the ads typically ranges in cost from \$3 to \$7, depending on the location. Our Craigslist posts feature the Econometrica logo, to increase legitimacy, and the same images as those posted on social media. Since Craigslist posts expire, the content is reposted approximately once a week. This helps keep the posts near the top of users' feeds. In our experience, paid Craigslist posts have resulted in the greatest number of interested applicants. This strategy may not be appropriate for all recruitment efforts, however, depending on the target population.

In addition to social media methods, we produce flyers with similar content as the online advertisements to distribute in person or electronically.

When recruiting local participants, Econometrica staff members have handed out hardcopy flyers to local businesses near the Econometrica main office and around the greater Washington, DC, area. Figure 4 shows an example of one such flyer. We target places such as restaurants, gyms, coworking spaces, and stores, where the flyers have high visibility. When canvassing businesses, whether in person or electronically, we present the purpose of the study to employees and ask whether they would be willing to either post the flyer or distribute it to their staff. We include a cover letter explaining the research to accompany the flyer. We also may hang the flyers on bulletin boards in places such as local grocery stores and community workspaces. The flyer includes a Quick Response (QR) code to easily scan from the flyer to the online screening tool. The purpose of targeting various types of businesses with paper flyers is to reach different types of participants who might not see the advertisement through an online channel, including employees or customers who might be interested in participating.

For recruitment of participants outside of the local area, we distribute the flyer electronically or via mail. In one recent engagement, we conducted cold calls to local businesses, schools, libraries, and community spots in the targeted areas across the country and asked whether they would be willing to advertise the study by displaying the flyer. If they were willing, the flyer was sent via email. We also sent flyers via email in outreach blasts to businesses, schools, and other locations of interest with email addresses that were publicly available online. We have also employed temporary staff in other locations who participate virtually in our training and then conduct in-person recruitment in the local area of the study.

Figure 4. Flyer



Monitoring

Throughout the process of executing outreach, we use a continuous monitoring cycle to ensure on-time and successful recruitment outcomes that meet the targets for our projects. Our team checks recruitment numbers daily by tracking the overall number of participant screening survey completions, as well as the number of individuals who completed the survey who prequalify—meaning they appear to meet eligibility criteria based on their survey responses. We use computer coding (e.g., SAS coding or Excel) to filter the participant screening survey responses to identify respondents who meet the criteria of our research. This automated system allows our staff to focus on the prequalified interested applicants.

Our screening survey includes a field that asks interested individuals how they learned about the opportunity, which is useful for monitoring the relative success of the various outreach methods. In our monitoring meetings, we discuss the relative success of each method and adjust accordingly to ensure we reach the right participants in the most cost-effective manner. We document lessons learned throughout this phase to keep record of which strategies work best at targeting which types of populations.

Participant Screening and Confirmation

Econometrica employees conduct phone and/or email screenings with eligible recruits. We confirm interest and assess availability to participate in the project and provide a brief overview of the study's purpose, aims, and logistical considerations. If respondents confirm interest and meet the qualifications for participation, they are then scheduled for participation. We employ reminder emails and phone calls prior to the date of the interview or focus group to confirm participation and provide logistics and reminders. Reminder communications are typically sent the week before, the day before, and the day of the study.

Conclusions

Our various recruitment methods result in a robust and diverse pool of recruits that complete the interest survey. By employing a broad range of recruitment strategies, we reach our goals for interview or focus group completions by drawing from a diverse audience of interested participants. It is crucial to have a large recruitment pool during the interview and focus group stage of qualitative research to offset attrition issues and cancellations. The approach and strategies discussed here are broad and may be tailored to a variety of qualitative research efforts.

About Econometrica

Founded in 1998, Econometrica is a research and management organization in Bethesda, MD, established to provide public- and private-sector clients with customized program support services. Econometrica works with multiple agencies to provide high-quality, cost-effective analyses, modeling, and economic evaluations. The company consistently receives exceptional scores from its clients and believes in three principles: technical capabilities, happy customers, and business growth.

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