Needles in a Haystack: Strategies for Recruiting Marginalized or Hard-to-Reach Populations

Ashani Johnson-Turbes
Michael Long
Andrew MacDonald
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, including Atlanta
- 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?

- **Three proposed methodologies:**
  1. Working with community-based organizations
  2. Using local site recruiters
  3. Using online tools and social media

- **Questions and Discussion**
Introduction: What Makes a Population Hard to Recruit?

Michael Long
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
WHAT MAKES A POPULATION HARD TO RECRUIT?

Three Reasons that People Might Be Hard to Recruit

1. The population may be small or scattered.
WHAT MAKES A POPULATION HARD TO RECRUIT?

Three Reasons that People Might Be Hard to Recruit

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

1. The population may be small or scattered.

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

3. The population is unlikely to agree to participate.

OR

OR

WHAT MAKES A POPULATION 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

Andrew MacDonald
Background

- This presentation draws on our recent experience on a study about attitudes toward financial institutions among low-to-moderate income (LMI) individuals, especially those without bank accounts.
- We conducted focus groups in five locations: New York, NY; Mobile, AL; Cleveland, OH; Jackson, MS; and Los Angeles, CA
- Recruiting challenges:
  - Client had strict recruiting quotas for factors such as age, gender, race, education, income, and experience with banks.
  - Client desired geographic diversity, including rural and urban participants, and multiple regions of country.
  - Target population is smaller and harder to reach than general population
- We used local CBOs to recruit a participant pool that met quotas
Defining a “Community-Based Organization” (CBO)

- 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
Reasons to work with a CBO

- **CBOs are trusted in their communities**
  - They 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

- **CBOs understand the local culture**
  - They can explain and frame research in a way that resonates with target population

- **CBOs have strong local networks**
  - They can put researchers in touch with key influencers.

- **There may not be a professional research in the area, especially in rural communities**
What CBOs can offer

- **Initial recruitment**
  - CBOs can make announcements, post notices, and initiate word-of-mouth campaigns

- **Mediate between researchers and target population**
  - CBOs can act as a familiar “face” of the research, especially if subject may be sensitive
  - CBOs can help frame questions in a way that resonates with the community

- **On-the-ground “fixer”**
  - Logistical support, e.g., identifying and coordinating site for focus groups or interviews
  - Reminder phone calls
Tips for identifying potential CBO 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 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, 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

- **Challenge: Following rigorous recruiting processes**
  - CBOs 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

**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

- **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 Local Site Recruiters

Ashani Johnson-Turbes
Background

- This presentation draws on our experience with a variety of studies using local site recruiters (LSRs) to recruit “hard to reach” audiences.

- Using examples from projects including:
  - African American Women in Mass Media (AAMM)
  - AAMM Message and Materials Testing Study
  - Test of Effectiveness of Screening Recruitment Messages
  - It’s Only Natural Mother’s Love, Mother’s Milk Pilot Testing
  - Southern Center Adolescents and Smoking Project
Defining a “Local Site Recruiter” (LSR)

- LSRs are individuals embedded in and working with their communities who have deep connections to community organizations, leaders, community members and the target audience(s) of interest for a particular study/project. LSRs are often connected to CBOs that reach target audiences. Examples of LSRs:

  - For the AAMM project – Local Health Department Staff
  - For the ION – “Community Transformers” working with Non Profit Organization
  - For the Black Church Project – Faith Leaders

- LSRs:
  - Are passionate
  - Are champions
  - Have community connections
    - Connected to organizations providing social services to target audiences
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APPROACH 2: USING LOCAL SITE RECRUITERS

CBOs and LSRS

Community with Target Audience

CBO (e.g., non profits, churches, affiliate chapters)

Community with Target Audience

LSR

- Church
- School (PTA)
- Non profit orgs
- CC
- Sports orgs
- Media
Reasons to work with a LSR

- Professional facilities may not exist in the community where you want to reach an audience.

- Even if they exist professional facilities may not have access to lists of the type of audience that you want to reach.

- LSRs...
  - KNOW their communities
  - ARE connected in their communities
  - ARE trusted in their communities
  - UNDERSTAND local culture and politics
  - HAVE strong ties to community and target audience
  - LINKED to local organizations
  - WILLING and able to conduct “boots on the ground” recruiting
What LSRs can offer

- **Access to and Information on audience**
  - Access to local community and target audience
  - Information about the target audience of interest
  - Knowledge of local community/cultural events

- **Information sharing with target audience**
  - Ability to offer advance information to audiences about recruitment
  - Ability to explain the project purpose and objectives to target audiences
  - Someone who is in person in a community answer questions from a population

- **Link between audience and researchers**
  - Someone in regular communication with audience AND researchers
  - Real time information on recruitment efforts, challenges, barriers and needs
Tips for identifying potential LSR partners

- Health departments
- Community-based organizations (CBOs)
- Your funder (e.g., CDC, OWH, etc.)
- Personal networks
- Professional contacts
How to convince LSRs to help with the study

- **Conduct a “LSR” Invitation Webinar**
  - Explain purpose of the study
  - Discuss how the study contributes to their work and community
  - Describe the importance of the study for their community and broader community
  - Discuss how the project address disparities related to their community

- **State that each LSR will have 1 point of contact in your organization to provide them with technical assistance.**

- **Offer payment!!!!**
  - Create subcontract or consulting agreements
Challenges to working with LSRs

- **Communication & Protocol**
  - Staying in regular communication (phone, email, online systems)
  - Following systematized recruiting processes
  - Sticking to recruitment reporting procedures
  - Adherence to completion of proper paperwork for payment

- **In the Field...**
  - Staying on message about project (and incentives)
  - Continued engagement and motivation
  - Exhausting community networks for recruitment
  - Difficulty with research locations (e.g., no public transportation)
  - Recruiting too many people for research activities
Tips to overcome Challenges

- LSR Training
- LSR Training refresher (during recruitment)
- Having 1 point of contact for LSRs
- Offer a variety of ways to stay connected to LSRs
- Checking in to help with completing necessary paperwork
  - For recruitment tracking
  - For reimbursement or payment
- Offer public recognition of LSR
  - Luncheon
  - Written accolades
  - Plaques and Certificates
  - Bonus payment

Ask LSRs, what could be done better and/or make their job as a recruiter easier!
Approach #3: Using Online Tools and Social Media

Ashani Johnson-Turbes
Background

- This presentation draws on our experience with studies where we have used Social Media (and online tools) to recruit “hard to reach” (HTR) audiences to studies.

- Using examples from projects including:
  - It’s Only Natural Mother’s Love, Mother’s Milk Pilot Testing
  - Cognitive Interviewing Projects
  - Breast Cancer in Young Women
  - Latino Men who have Sex with Men
Defining Social Media

- “Forms of electronic communication (as Web sites for social networking and microblogging) through which users create online communities to share information, ideas, personal messages, and other content (as videos)”
  
  (Merriam-Webster)

- “Websites and other online means of communication that are used by large groups of people to share information and to develop social and professional contacts”.

  (Dictionary.com)
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.**
Quotes about Social Media

“Social media is part of the rise of **participatory culture** which **empowers users**”

“Social media is fundamentally a **participative medium** with online experiences increasingly involving methods of actively providing information about what we are doing or what we are thinking”

““Social media is both **changing society as well as responding to and reflecting changes in the society**”
Images of Social Media Online

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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**

<table>
<thead>
<tr>
<th>Social Media Site</th>
<th>Latino Percentage</th>
<th>Black Percentage</th>
<th>White Percentage</th>
<th>All Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>73</td>
<td>67</td>
<td>71</td>
<td>71</td>
</tr>
<tr>
<td>Instagram</td>
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<td>12</td>
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<td>28</td>
</tr>
<tr>
<td>Twitter</td>
<td>25</td>
<td>27</td>
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<td>23</td>
</tr>
<tr>
<td>Pinterest</td>
<td>21</td>
<td>28</td>
<td>32</td>
<td>28</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>18</td>
<td>28</td>
<td>29</td>
<td>28</td>
</tr>
</tbody>
</table>

% 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

**PEW RESEARCH CENTER**
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!
Implementing Recruitment Effort

- Know your audience to select proper recruitment:
  - CBOs
  - LSRs
  - Social Media
    - Other (Professional facility)
    - Traditional media (radio, OOH, local newspapers)
- Prepare a recruitment plan (mixed modal is ideal)

- Work with partners that best know your audience (gate keepers)

- For Social Media recruiting:
  - Know audience preferences
  - Create a FB page
  - Create Instagram profile
  - Create a Twitter username/handle
  - Create a Craigslist ad (and linked online screener)
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
  - For example not knowing proper terms and how to use it

- Using complex language in a social media advertisement or online recruiting instrument

- Including too much information in social media advertisement or in online or 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
- 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
Discussion…