University of Massachusetts Medical School UMASS

UMassMemorial

Human Subject Recruitment for Department of Psychiatry Research Studies

Instructions: Successful recruiting often depends upon personal and/or professional relationships with partners, partnering organizations, and individuals who may participate in your research. Developing and maintaining positive relationships often depends upon careful consideration of issues that relate to the likelihood that your planned research can be feasibly accomplished within the time envisioned. This checklist is intended to help structure your thinking about relevant issues as you prepare your grant proposals and/or materials for the Institutional Review Board.	

CHECKLIST	NOTES

☐ **Specify target population**
   • Age range of participants? _____
   • Participants: Numbers of males _____ females _____?
   • Primary diagnosis and secondary diagnoses_____
   • Inclusion and exclusion criteria (list)_____
   • English speaking only? yes _____ no _____
        If other languages (list)? _____	

☐ **Assess feasibility and efficiency of study design**
   • Design optimized to minimize numbers of recruits needed?
   • Flexibility in inclusion and exclusion criteria if needed?
   • Time commitment for participants, i.e. number of visits ___; number of weeks ___?
   • Study duration: minimum _____; predicted _____; maximum _____
   • Foreseeable barriers to recruiting (e.g. competition from other studies, adequate time available, difficulties identifying/communicating with potential recruits, etc.)
   • Foreseeable barriers to timely completion (if any)? _____	

☐ **Specify methods of recruitment**
   • Personal contacts with physicians, therapists, educators, etc.?
   • Medical records accessible within home organization(s)?
   • Partnering organizations and organizational contacts identified? Accessibility and organizational interest evaluated realistically (i.e., why would the organization want to work with you)?
   • Availability and size of potential participant registries/information repositories?
   • Networking possibilities, professional and personal?
   • Advertising approaches: Website, social media, brochures, radio/TV?	

☐ **Identify resources needed**
   • Personal and/or staff time for:
       o Locating & attending events/opportunities for recruiting (e.g., conferences, fairs, etc.)?	

- o Partner organization outreach and relationship maintenance? - o Participant contact (initial contacts, screening, follow-up, feedback on results)? - o Supporting advertising approaches (i.e., materials development, maintenance, etc.)? • Financial resources available for: - o Paying costs of advertising approaches? - o Cost reimbursement for participant expenses (e.g., travel, parking, daycare, etc.) - o Incentives for participants	
☐ **Assess relevant professional partnership(s)** • Existing relationship(s) - o Recency of contact (has the relationship been maintained or must it be rebuilt)? - o Track record of previous recruiting (individual & institutional) - o Outcome assessment of past projects - o Status assessment of present relationship(s) (how are you presently viewed?) • Current and/or past benefits to partner(s) - o Presentation of research planned or executed - o Workshops or trainings - o Non-research consultations	
☐ **Building and maintaining participant relationships** • Facilitating participation - o Home, community, and/or online participation? - o Flexible participation schedules? - o Accessible, attractive recruitment materials? - o Informants available to advise on effective recruiting approaches? - o Personal touches, esp. in long studies (i.e. birthday/holiday cards, phone contacts, etc.) • Incentives - o Potential individual benefit from participation (e.g., added attention, care, etc.)? - o Potential individual benefit from research findings (e.g., new diagnoses, treatments, etc.)? - o Research findings disseminated in accessible manner (e.g., lay language reports, newsletters)? - o Clear benefits to organization serving the participant (e.g., discussion of potential assistance in research translation, program evaluations, publicity, etc.)? - o Compensation for travel, daycare, and other out-of-pocket participation expenses? - o Compensation for time involved in extended participation?	