Overview

Engagement is a fundamental challenge among community program planners, policymakers, and researchers who work with low-income populations—connecting with an individual or family in order for them to participate in a program or research project. Often, recruiters give little thought to the process of recruitment or engaging families, assuming that "needy" families are desperate for help and will be eager to participate in programs or intervention research. However, low-income populations have significant barriers to participation in programs and research such as economic stress due to lack of resources. What is lacking in the literature is an understanding on the part of the "recruiter" about the time, resources, and strategies needed to recruit a low-income family. Researchers and program planners develop strategies to reach families, but these strategies are rarely documented and are bound, often unintentionally, by organization policies and practices. The goal of this research project, entitled *Exploring System Barriers and Enablers in Recruiting Low-Income Populations (RLIP)*, was to document service provider and researcher (a) methods of recruitment, (b) assessment of what works and what does not work, (c) barriers, (d) resources needed for success, and (e) retention strategies.

Why is engagement important?

Understanding recruitment and engagement is important for researchers, community program planners, and service providers. For researchers, recruiting enough participants has implications for key research design issues such as populating the sampling framework and statistical power. Most studies are unable to enrol the target sample size within the original recruitment timeline, leading to either an extension of the recruitment period, an expansion of inclusive criteria, addition of recruitment strategies or locations, or termination of the study (Hunninghake, Darby, & Probstfield, 1987; Lovato, Hill, Hertert, Hunninghake, & Probstfield, 1997). For community program planners, programs are sometimes undersubscribed and program policies and guidelines are implemented that may be detrimental to family participation. For both researchers and community program planners, recruiting low-income families is time consuming, which has huge implications for allocating resources.

Method

Two surveys were created using SurveyMonkey, an on-line survey tool: one for researchers and one for serviceproviders. The surveys included both rating scales and open-ended questions. Participants (service providers and researchers) were recruited through local, provincial, national, and international email mailing lists. Email mailing lists were targeted with the criterion of participants' likelihood of engaging low-income families and individuals through programs and research studies.

Summary of Results

According to researchers and service providers, there are varying definitions of what it means to be a low-income family or individual. Like these definitions, these families and individuals are diverse—economically, socially, and culturally—with their own unique needs and challenges. Therefore, it is essential that recruiters invest time and resources into considering ways to best connect with families and individuals they are hoping to engage in their research studies and programs prior to recruitment.

Recruitment

- **Invest time and resources into recruitment planning.** Use multiple recruitment strategies based on the needs (e.g., materials in multiple languages or literacy levels) of your target group. Budget for a study's recruitment (e.g., staff resources, advertising costs, honorariums) to ensure that time and resources are reserved in case of extended recruitment. Make the consent or enrolment process easy to understand using plain language. Recruit during less busy times of the year (i.e., summer). Have a diverse, well-trained, and supportive recruitment team. Have researchers from the community be part of the research team.

- **Make personal contact a priority.** Meet potential participants face-to-face and encourage families and individuals to tell others about your program or study—word-of-mouth is key! Be as present as possible in the community: attend community events, partner with other agencies or leaders in the community, and go to where potential participants may gather.

- **Take time to develop relationships built on trust:** Connect regularly with participants in welcoming, respectful, and non-judgmental environments; listen to families' and individuals' needs; let them know their participation matters; and ensure they understand how the study or program will benefit them.

- **Make participating easier by helping to meet low-income families' and individuals' basic needs.** When possible, provide flexibility in participation hours and locations, offer meals or snacks, transportation or vouchers, and child care. Show you value their participation by providing honorariums (e.g., gift cards, coupons). Provide multiple services in one location or offer to refer to other services.

Retention

- **Help families and individuals meet their basic needs** Offer snacks and meals during study or program, transportation, and child care. Conduct studies and programs in convenient locations to participants, such as follow-up home visits, during routine appointments, at community events.

- **Appreciate participants' diversity.** Have linguistic resources (e.g., interpreters) or other language staff available to assist participants where needed, ensure diversity of staff at study or program site.

- **Remember that families and individuals are busy.** Provide them with friendly reminder phone calls/ emails about study or program. Seek to understand why participants may not attend sessions or show up late and develop ways to help them remain in the program or study.

- **Seek input and feedback from program participants.** Provide participants with choices of how they would like to engage in activities. Encourage participants to provide feedback about the program to ensure the program is meeting their needs.

Incentives

- **Make participating easier for potential participants by helping meet their needs.** Offer flexibility in hours and conduct the study or program in a convenient location for participants (e.g., in target groups' neighbourhoods, during community events, home visits). Offer meals or snacks during participation, transportation, and child care. Show you appreciate their participation by providing honorariums that participants value (e.g., money, gift certificates, coupons).

- **Emphasize how participants, as well as how others, will benefit from their participation.**

- **Provide an opportunity during or after programs for families and individuals to socialize with others and build contacts/supports with others in their communities.**

Communication

- **Use multiple communication strategies.** In the current study, face-to-face and phone calls worked best for the researchers and service providers. Ask families and individuals how they would like to be contacted. Provide interpreters if needed.

Challenges

- **Take time to understand the competing priorities of the low-income families and individuals you are looking to recruit.** Develop ways to help overcome barriers for participants (e.g., provide transportation, child care, flexible times to participate, convenient location). Offer participants incentives that match with the time and energy required to participate.

- **Build relationships based on trust and persevere to establish contacts.** Take time to get to know low-income families and individuals in order to combat their possible negative experiences with institutions/professionals and nervousness about participating. Be sensitive to participants feeling of pride and negotiate ways they can contribute to the program (e.g., small donation, volunteer time, share experiences with others). Ask participants whether the program or study is meeting their needs. Partner with organizations and agencies that have positive relationships with potential participants. Ask participants for multiple ways to contact them (e.g., family phone numbers, mailing address, email address, family or friend's contact information).

- **Use multiple and appropriate recruitment strategies.** Budget enough time, money, and resources to effectively recruit participants. Help make families and individuals aware of the participation opportunities available to them. Provide materials in multiple languages or literacy levels. Offer the use of an interpreter.

- **Plan in advance for possible time delays to meet ethical requirements.** Meet with an ethics review representative throughout the study design process to learn ways participants' needs can be met (e.g., appropriate literacy levels/language on consent forms, multiple ways to gain consent). Factor in time for ethics review and necessary amendments. Consider how privacy protection acts will limit ability to contact potential participants in order to recruit accordingly. Know how funding can be used in advance (e.g., can funding be used for honorariums?).

Based on the findings in each section above, there seems to be four key recommendations that both researchers and service providers thought were meaningful to engage low-income families:

        Reduce participation barriers by helping meet families' and individuals' needs
        Build trust and personally connect with families and individuals
        Invest resources into recruitment and use multiple strategies
        Explain to families and individuals how they will benefit from their participation

The full report is a preliminary overview of our findings and we hope to produce many more products that highlight recruitment and retention issues. The full report includes:

(a)   Review the current literature on barriers for low-income individual or family participation in programs and research studies and recommended recruitment and retention strategies;

(b)   Share the results of two surveys created for service providers and researchers that asked them to provide us with their experiences of recruitment and retention strategies;

(c)   Quantify the resources needed to implement these strategies;

(d)   Compare differences between researcher and service provider approaches; and

(e)   Summarize learnings and provide implications.