

**modernist
studio.**

RESEARCH RECRUITMENT & SCREENING

RECRUITMENT PLANNING

A recruitment plan is a model to help you identify appropriate participants for your research.

The goal of a recruitment plan is to identify the specific behaviors, contexts, and experiences in which you will do research, and then select the most appropriate participants for your research. A good recruitment plan helps you:

- Communicate intent to your research team
- Describe the people that need to be found for research
- Balance important behavioral characteristics with demographic characteristics

RECRUITMENT PLANNING

The goal of a recruitment plan is to identify the individuals who are most likely to have experiences that provoke thinking and spark novel approaches.

Your goal is to build a recruitment plan detailed enough that it could be handed it to a stranger and they can find the right participants.

Focus:

What you are hoping to understand

Who:

The people and behaviors you hope to observe

Where:

The context in which the behavior happens

BUILDING A RECRUITMENT PLAN

Start with your focus statement & goals

Focus

We are conducting design research into student and counselor experiences of planning for college transfer and degree completion.

Goals

1. To build empathy with our target audience, so we can better feel what it's like to be a student or counselor focused on credit transfer and planning.
2. To identify the way both students and counselors think about their academic experience, particularly focused on course selection, planning, and degree completion.
3. To observe current processes and strategies (both good and bad) used by participants to aid in their school and course planning.

BUILDING A RECRUITMENT PLAN

Identify the people to recruit based on behavior.

Focus: Understanding student and counselor experiences of planning for college transfer and degree completion.

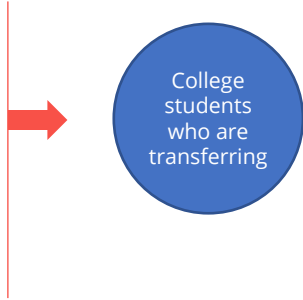


What behaviors do these people have?

BUILDING A RECRUITMENT PLAN

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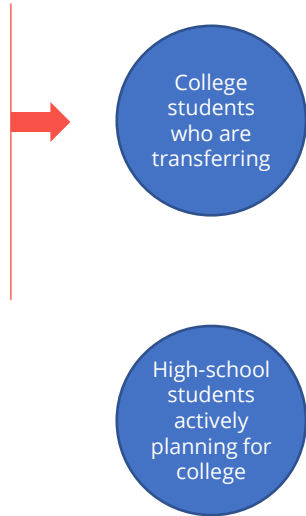
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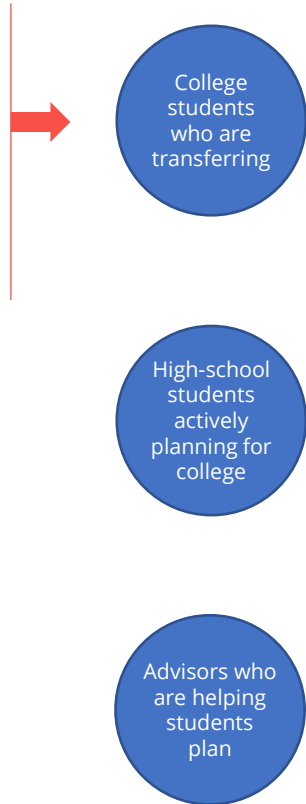
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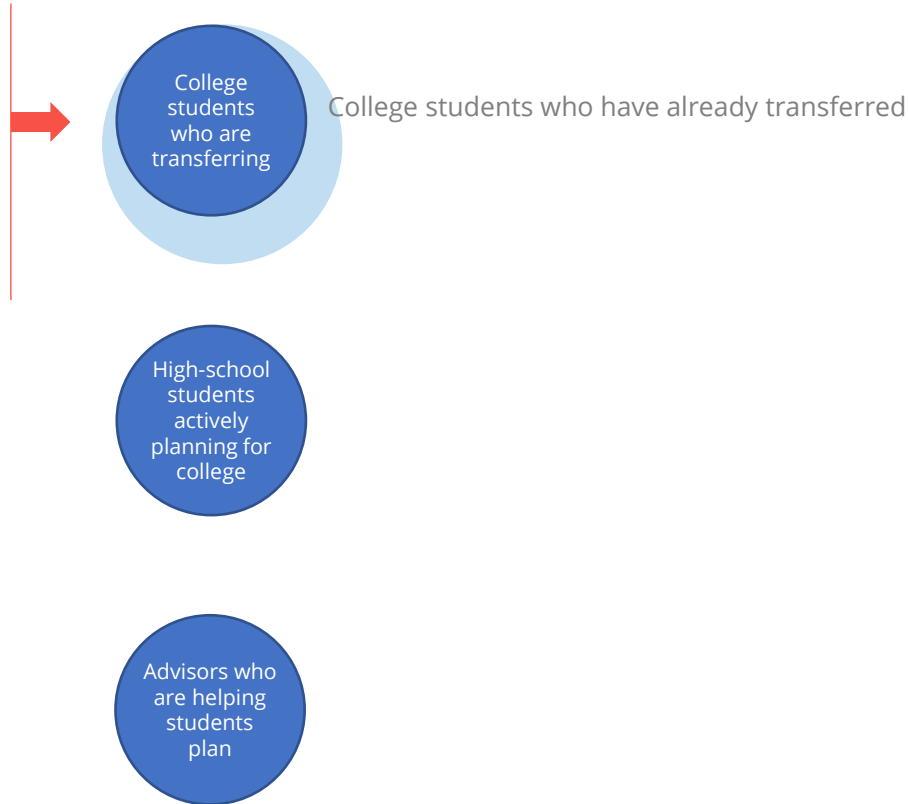
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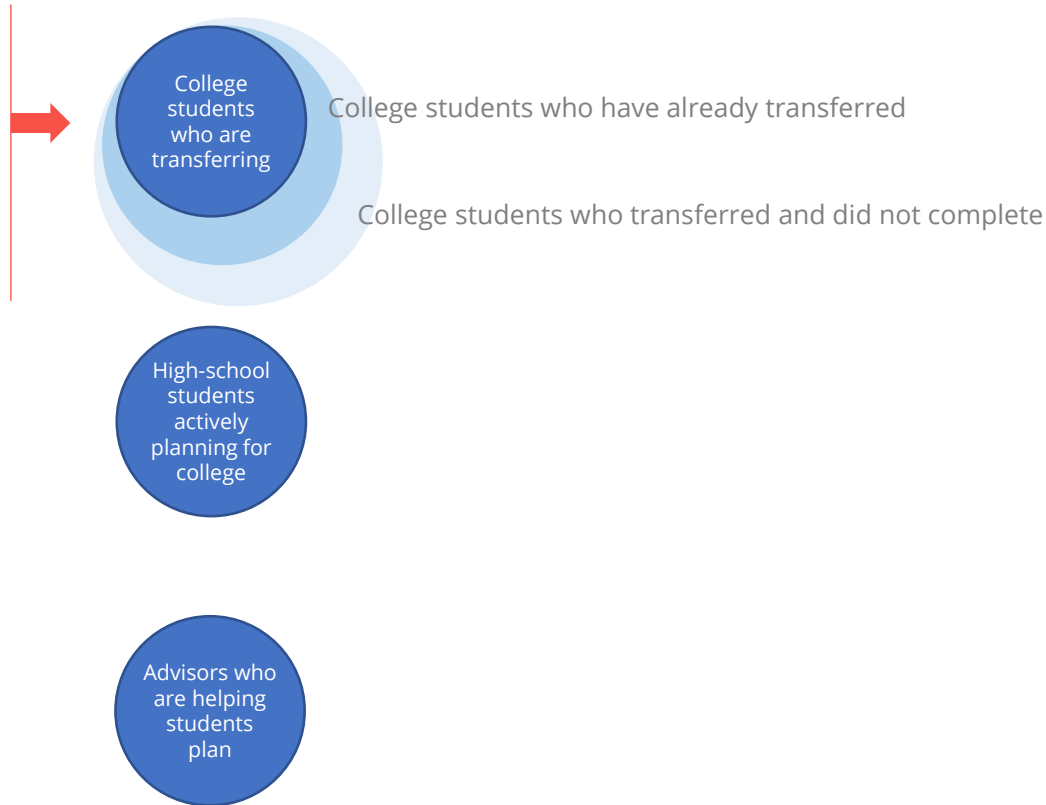
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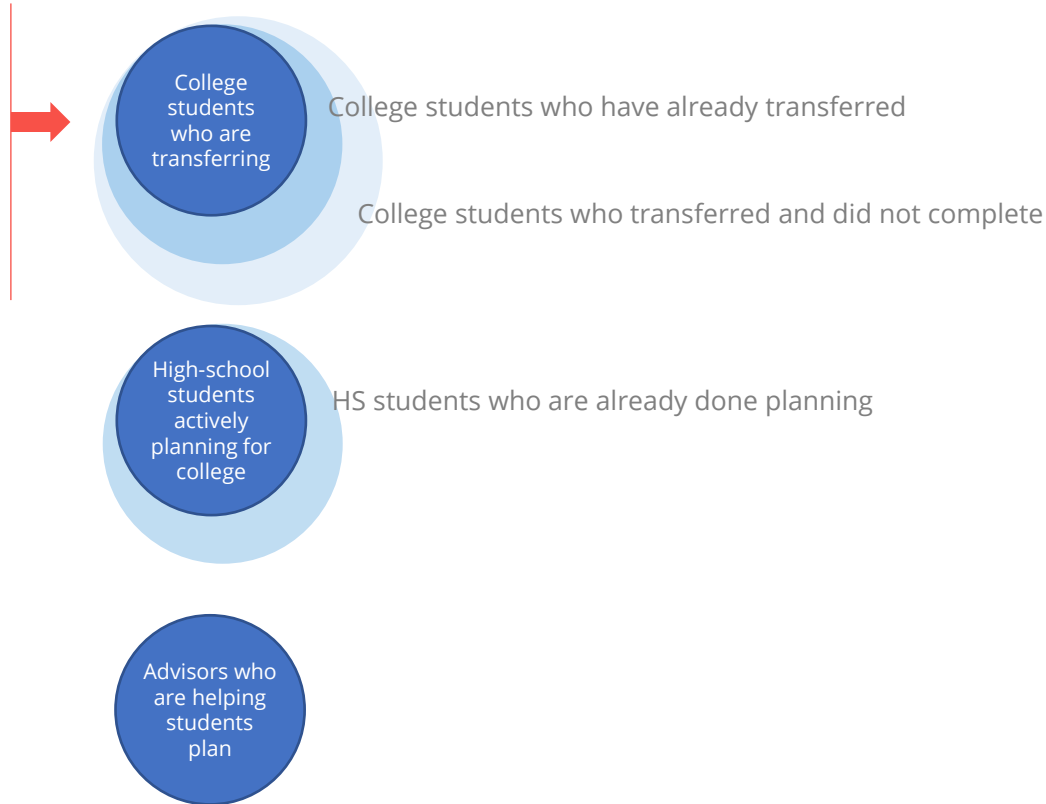
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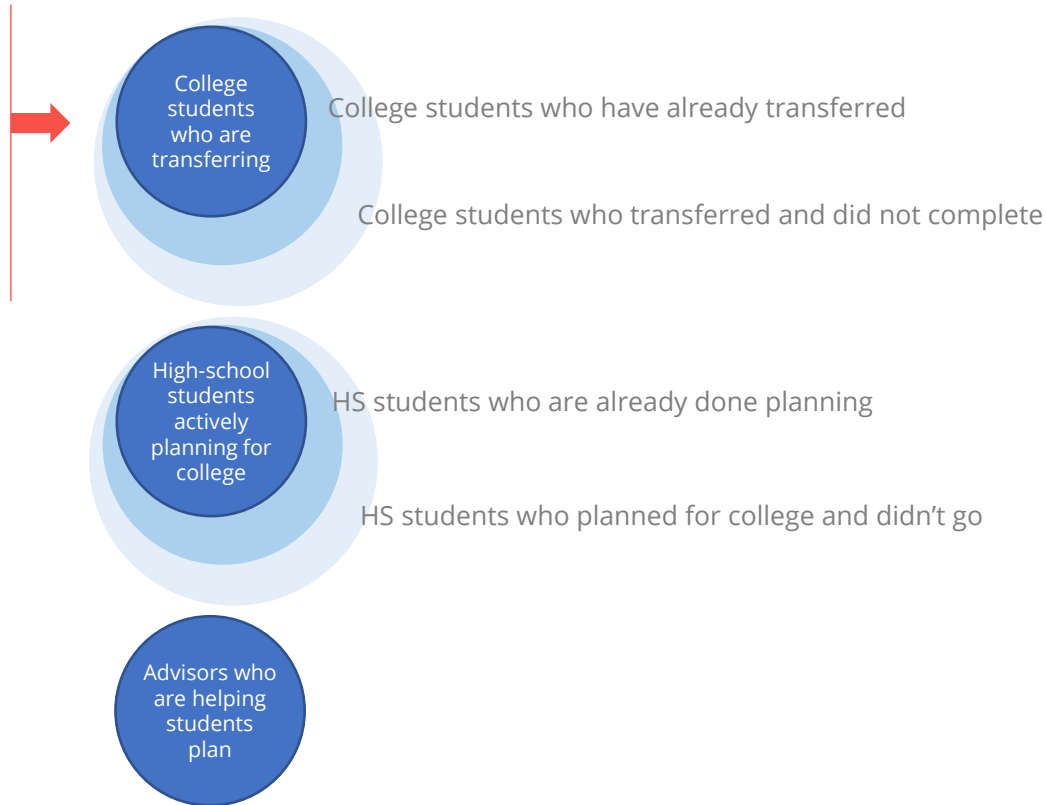
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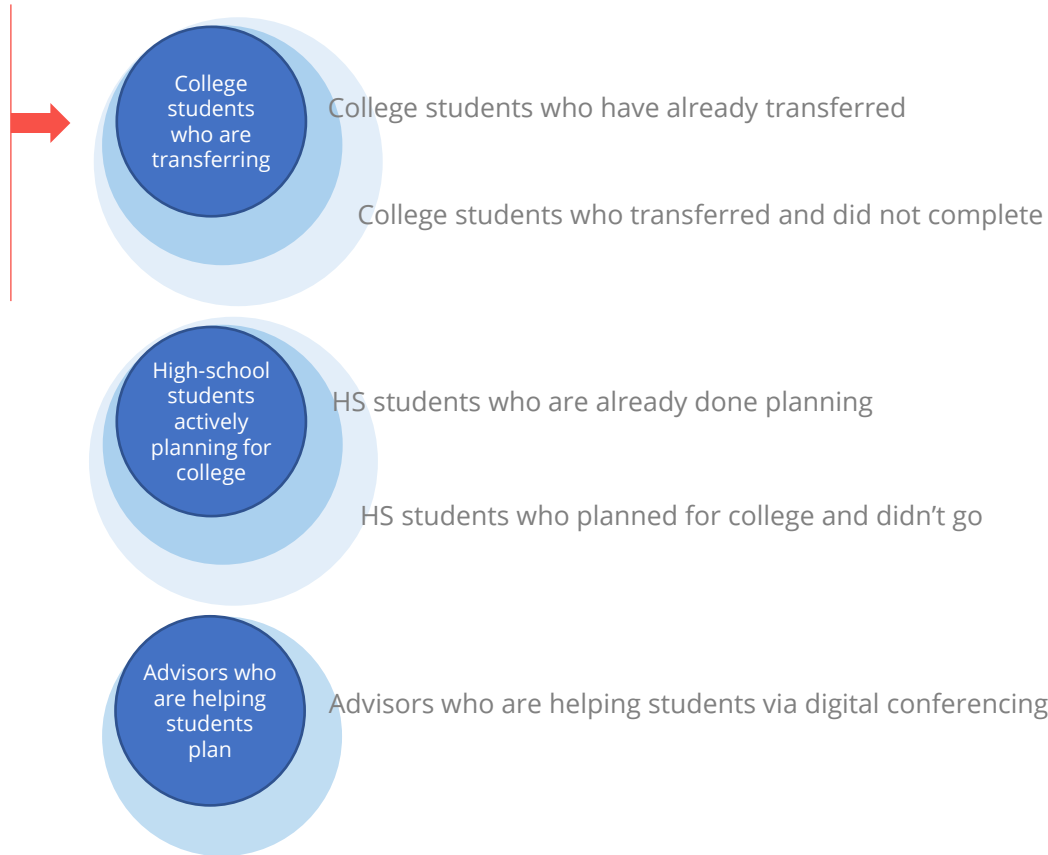
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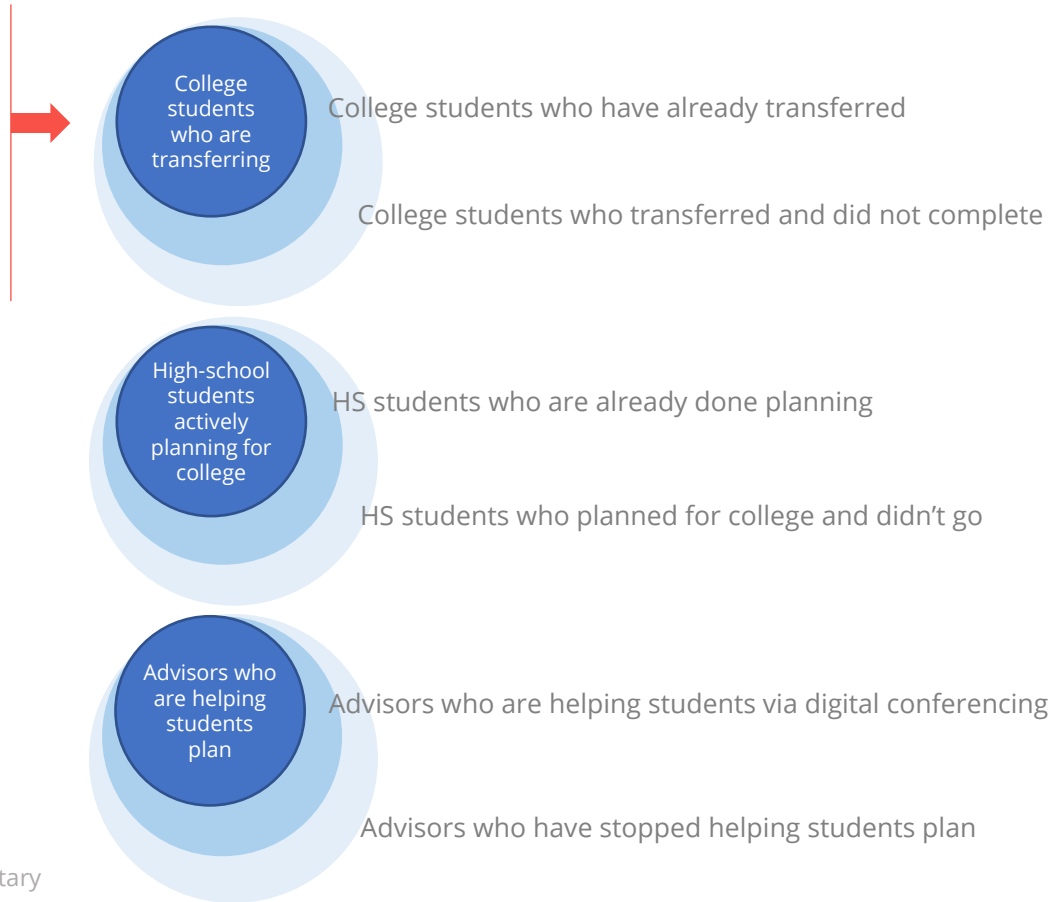
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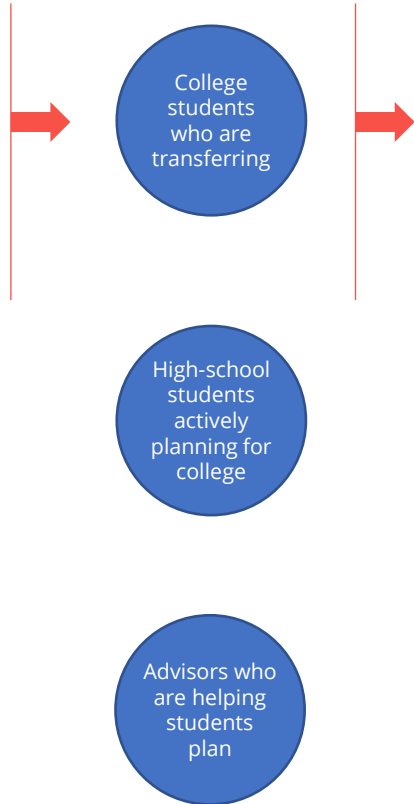
Focus: Understanding student and counselor experiences of planning for college transfer and degree completion.



BUILDING A RECRUITMENT PLAN

Narrow, based on general defining characteristics.

Focus: Understanding student and counselor experiences of planning for college transfer and degree completion.



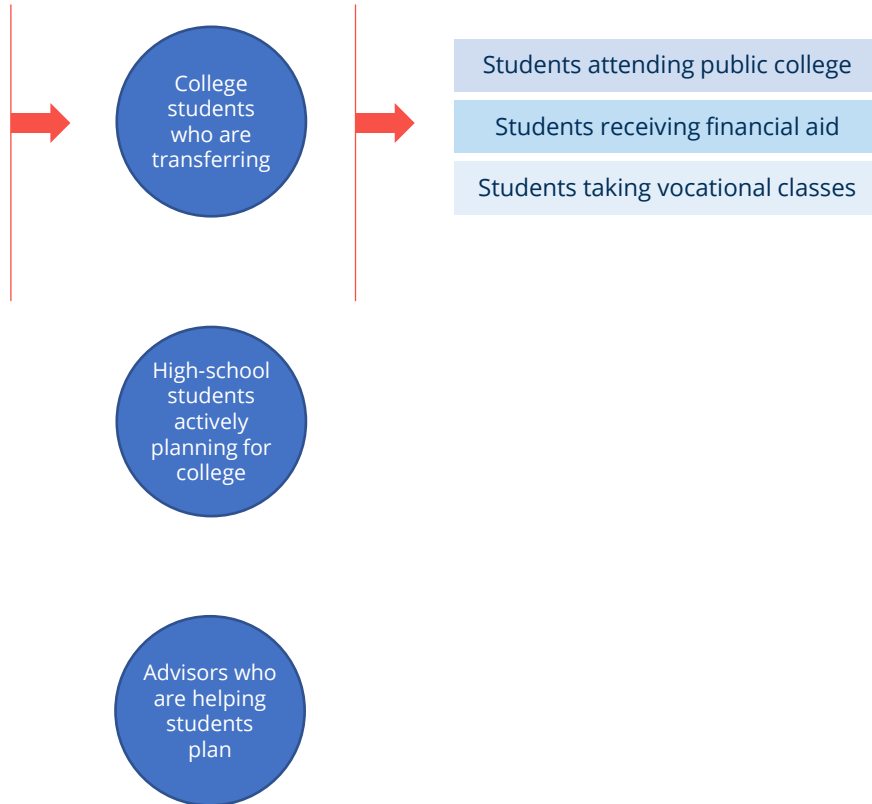
What are the general traits that define these people?

Avoid basic marketing demographics ("white 32 year old woman")

BUILDING A RECRUITMENT PLAN

Narrow, based on general defining characteristics.

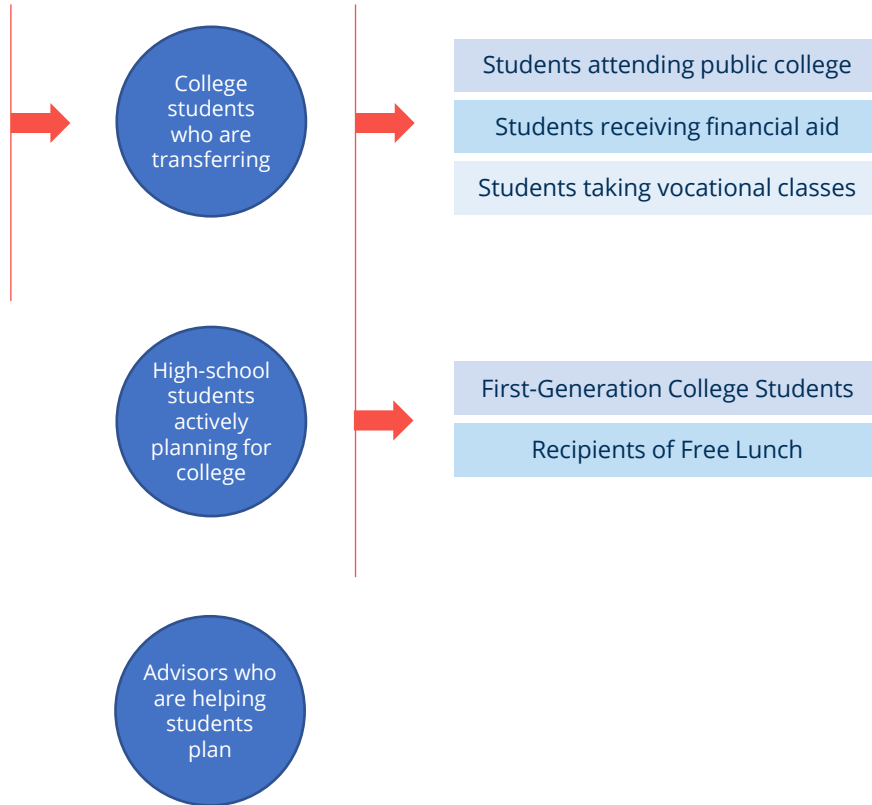
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BUILDING A RECRUITMENT PLAN

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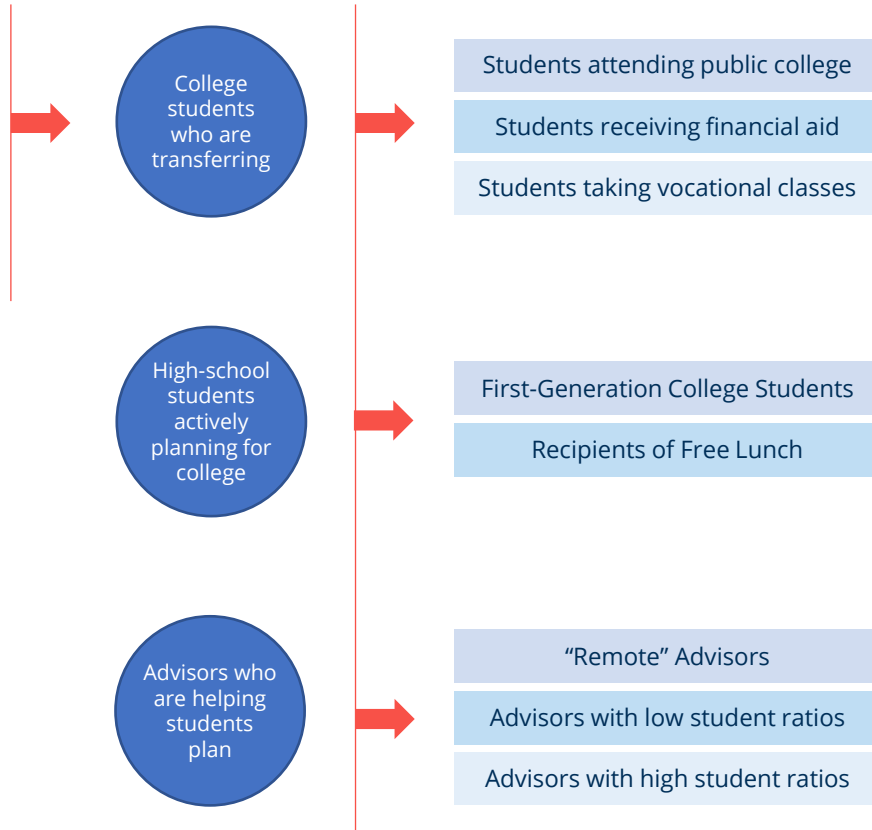
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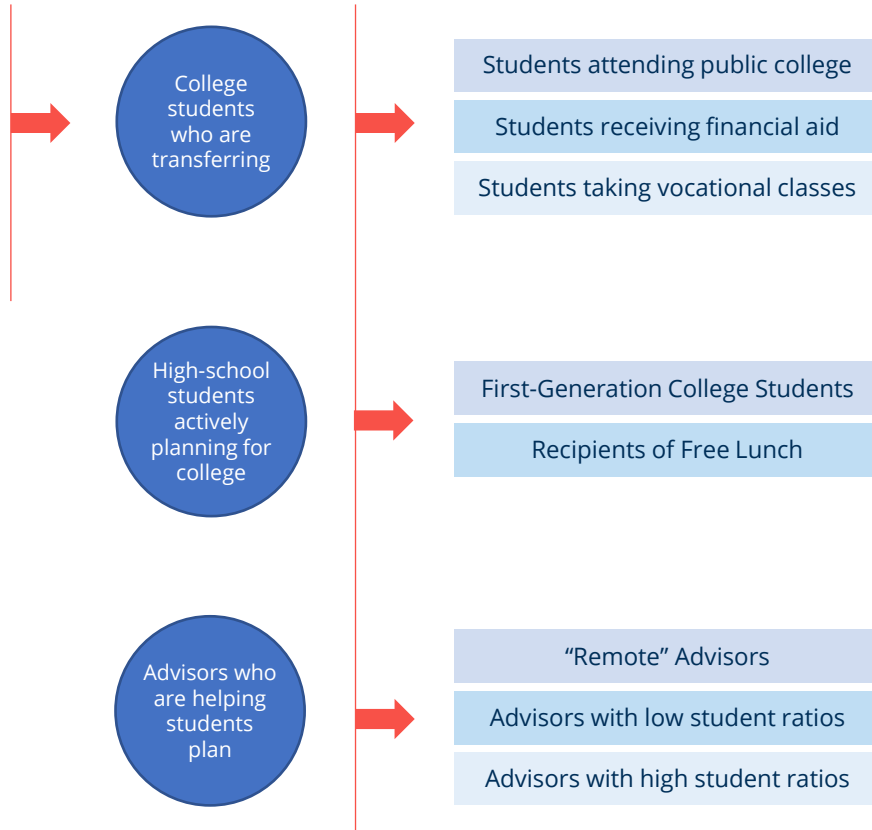
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BUILDING A RECRUITMENT PLAN

Describe the context where these people work & live.

Focus: Understanding student and counselor experiences of planning for college transfer and degree completion.

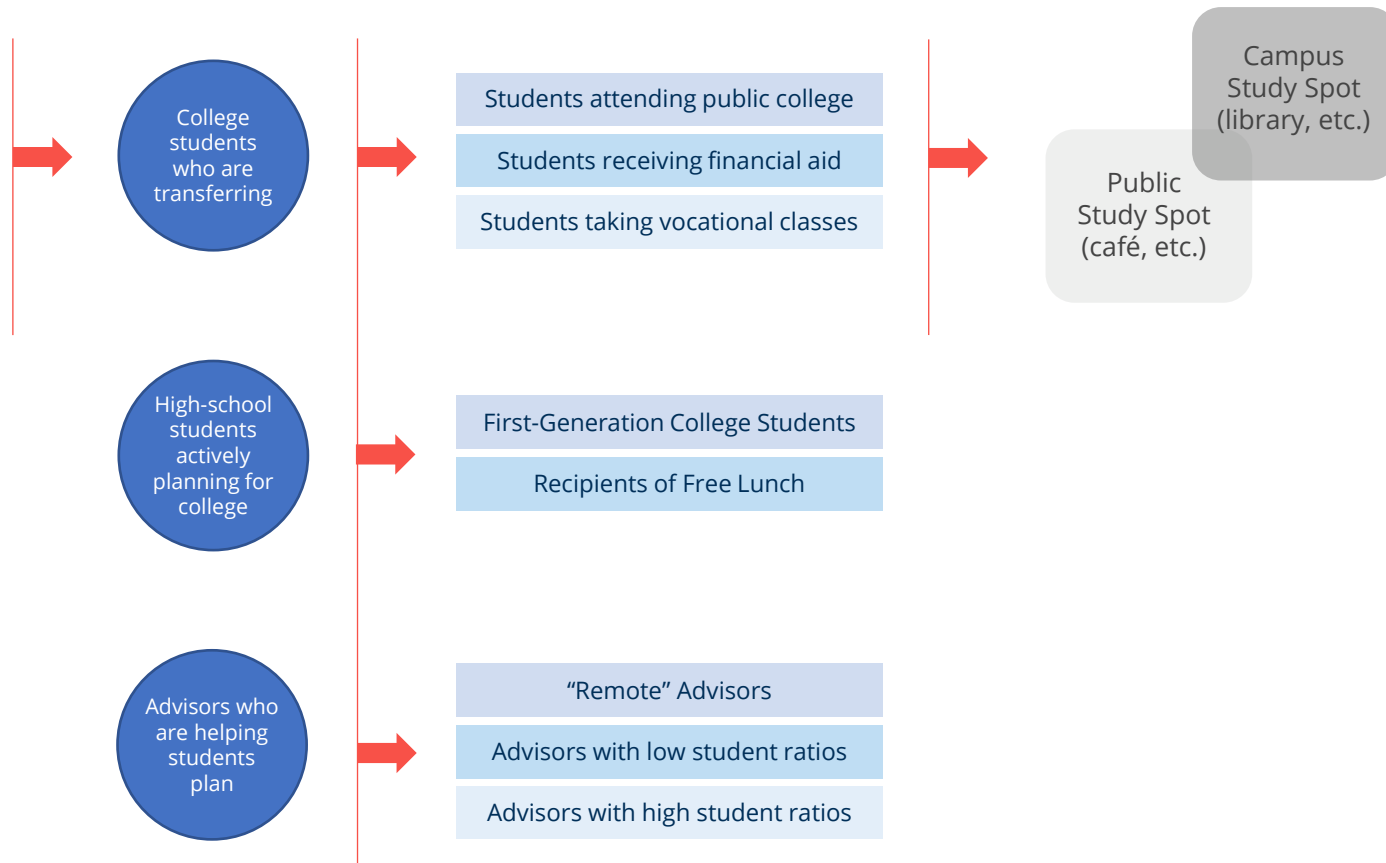


Where can we find these people?

BUILDING A RECRUITMENT PLAN

Describe the context where these people work & live.

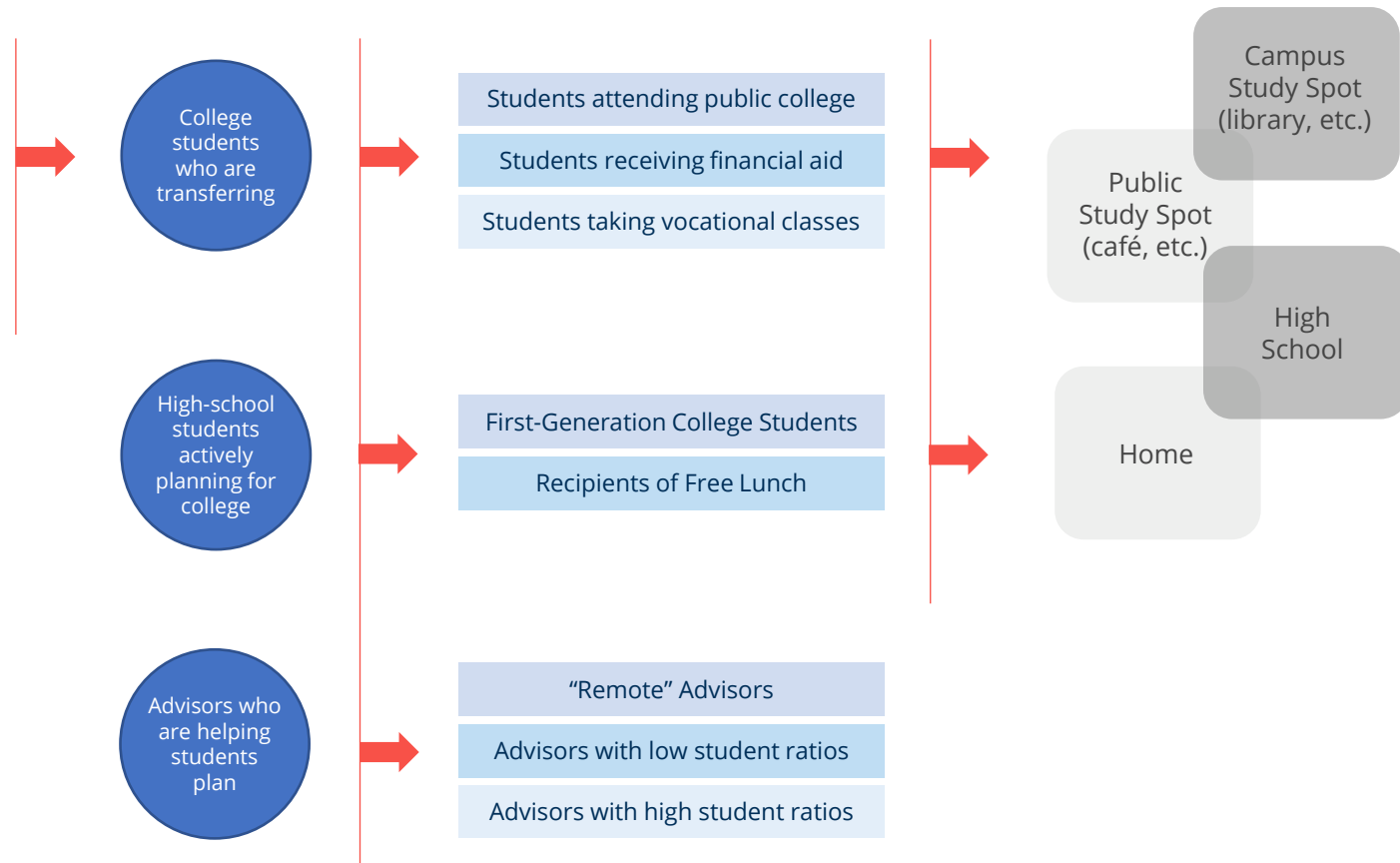
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BUILDING A RECRUITMENT PLAN

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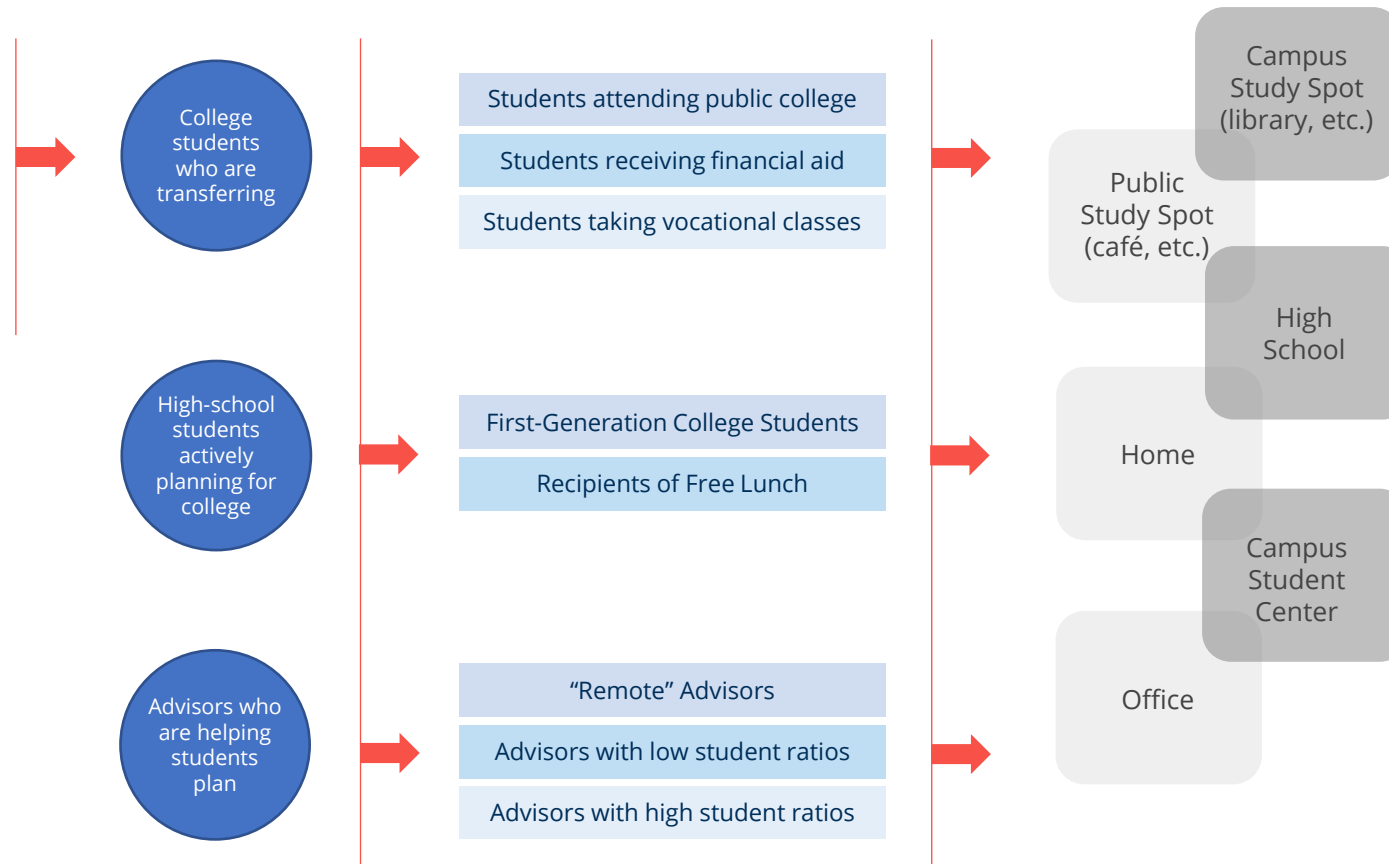
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BUILDING A RECRUITMENT PLAN

Describe the context where these people work & live.

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BUILDING A RECRUITMENT PLAN

How many people?

Our goal is provocation, empathy, and understanding – not prediction.
We don't need to be statistically significant, objective, or unbiased.

There is no expectation that the results we learn are generalizable.

Heuristic: Recruit between 8-20 people.

BUILDING A RECRUITMENT PLAN

When identifying your n value, ask yourself...

- Whose behavior and experience is *most* essential to understand?
[Make this the highest quantity of recruits]
- What demographics and circumstances might affect behavior and experiences? [Make this a lower # of alternate recruits, or a subset of your priority recruits]
- What type of people do the stakeholders want to see represented?
[Meet stakeholder count requirements, if any]



BUILDING A RECRUITMENT PLAN

Build a recruitment spreadsheet:

| | Type | Group 1: Denton | | Group 2: Farmers Branch, Irving, Richardson | | | Group 3: Dallas | | | | | Group 4: Lancaster, Mesquite | | Adult learner (35+) | Planning to transfer from a 2-year to a 4-year | Already transferred from a 2-year to a 4-year | *Free or reduced price lunch in HS* | Attended Early College High School | Taking Courses at More Than One Institution | Attending all-online, at either Mountainview, Brookhaven, or University of North Texas at Dallas | |
|----|-----------------------------|--|---------------------------|---|--------------------|-------------------------------|-------------------|-----------------------|------------------|-------------------------------------|------------------------|------------------------------|-------------------|---------------------|--|---|-------------------------------------|------------------------------------|---|--|-------|
| | | Texas Woman's University | University of North Texas | Brookhaven College | North Lake College | University of Texas at Dallas | El Centro College | Mountain View College | Richland College | University of North Texas at Dallas | Tarrant County College | Cedar Valley College | Eastfield College | | | | | | | | |
| 1 | Post-Secondary Student | (Any in group) | | | | | | | | | | | | Qty 2 | Qty 8-10 | Qty 8-10 | Qty 8-10 | Qty 2 | Qty 2 | N/A | |
| 2 | Post-Secondary Student | (Any in group) | | | | | | | | | | | | | | | | | | | N/A |
| 3 | Post-Secondary Student | (Any in group) | | | | | | | | | | | | | | | | | | | N/A |
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| 6 | Post-Secondary Student | | | | (Any in group) | | | | | | | | | | | | | | | | Qty 1 |
| 7 | Post-Secondary Student | | | | (Any in group) | | | | | | | | | | | | | | | | |
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| 19 | Post-Secondary Student | | | | | | | | | | | (Any in group) | | | | | | | | | N/A |
| 20 | Post-Secondary Student | | | | | | | | | | | (Any in group) | | | | | | | | | N/A |
| 21 | College Academic Advisor | Any of the listed colleges | | | | | | | | | | | | | | | | | | | |
| 22 | College Academic Advisor | Any of the listed colleges | | | | | | | | | | | | | | | | | | | |
| 23 | Incoming High School Senior | Any high school, in the geographic area of any of our colleges | | | | | | | | | | | | | | | | | | | |
| 24 | Incoming High School Senior | Any high school, in the geographic area of any of our colleges | | | | | | | | | | | | | | | | | | | |

BUILDING A RECRUITMENT PLAN

Write the plan.

A recruitment plan synthesizes these behaviors, demographics, contexts, & counts into recruitment criteria. It's a stand-alone document *that has enough detail in it that someone else can recruit your participants for you.*

Student & Advisor Recruitment Plan

The focus of this research is to understand student and counselor experiences of planning for college transfer and degree completion. The goals of this research are:

1. To build empathy with our target audience, so we can better feel what it's like to be a student or counselor focused on credit transfer and planning
2. To identify the way both students and counselors think about their academic experience, particularly focused on course selection, planning, and degree completion.
3. To observe current processes and strategies (both good and bad) used by participants to aid in their student planning

Participant Profiles

Research will be conducted in 4 groups in and around the Dallas area. Recruit should include a variety of genders and ethnicities, and include at least 2 African-American, 2 Hispanic, and 2 Asian students.

Criteria

College Students

- **Must** be enrolled in a 2- or 4-yr public or private college in Denton, Irving, Dallas, or Lancaster; OR
- **Must** be enrolled in an online university and live in Denton, Irving, Dallas, or Lancaster; AND
- **Must** be actively planning to transfer from a 2-yr to a 4-yr school; OR
- **Must** be actively planning to transfer from a 4-yr to a 2-yr school

College Students-Alternate

- **May** have transferred from another school (within 24 months) AND be currently enrolled in a public or private college in Denton, Irving, Dallas, or Lancaster; OR
- **May** have transferred from a 2-yr to a 4-yr (within 24 months) AND did not complete; OR
- **May** have transferred from a 4-yr to a 2-yr (within 24 months) AND did not complete

SCREENING PARTICIPANTS

A screener is a set of criteria to ensure that the participants you are recruiting match the behaviors and contexts you want to observe.

A screener acts as a filter. It is used by your recruitment partner (or by you and your team) to screen out candidates that do not fit specific criteria.

SCREENING PARTICIPANTS

A screener asks questions of potential participants that directly build on the recruitment plan you've just developed.

Your screener will find people who:

- Model behavior and experience that is most essential to understand
- Model alternate behaviors & experiences and demographics & circumstances that *must* be included for research to be valuable
- Model behaviors, experiences demographics, and circumstances that are ideal but of secondary importance to be included
- Model who the stakeholder wants to see represented
- Can be filtered out via a short phone call

SCREENING PARTICIPANTS

**Screener questions
are specific, and
easily answerable by
participants with
short responses.**

Screener – College Transfer Students & Adult Learners

1. Are you attending (Group 1 / Group 2 / Group 3 / Group 4 schools)?
If no, stop
 - a. *For students at Mountainview, Brookhaven, or University of North Texas at Dallas:*
Are you attending school entirely online?
For segmentation – qty 1
2. Are you transferring from a 2-year/4-year school located in Texas, to another school in Texas?
Or, did you just finish transferring from a 2-year/4-year school located in Texas, to another school in Texas, in the last year?
If neither, stop
3. Did you receive “Free or reduced price lunch” in high school? (*Intent: lower socioeconomic background*)
For segmentation – qty 8-10
4. Did you attend and “early college high school”?
For segmentation – qty 2
5. Are you taking courses at more than one school right now?
For segmentation – qty 2
6. What’s your age?
For segmentation – over 35, qty 2
7. Gather demographics
Gender, children, married, current city, city where born



RECRUITING

Begin the recruiting.

There are four main recruiting methods; each follows a unique path and has unique challenges.



Intercepts



Internal / Organizational

Participant Profiles

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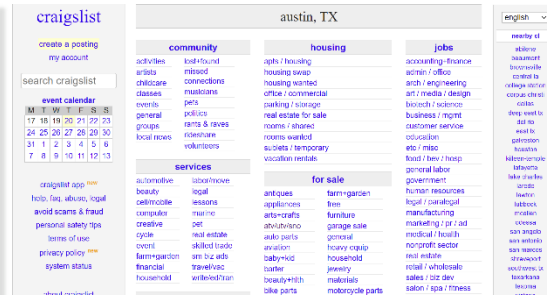
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External Recruiter



Craigslist & Social Sites

RECRUITING

Method 1: Intercepts

**Method**

“Open calls” to the public via digital posts/social forums, physical fliers, or on-the-street encounters

Value

Low barrier for participation; rapid participation validation; broad recruitment pool

Roadblocks

Requires broad focus; low trust/payoff = low motivation to participate; potential time-waster

RECRUITING

Recruiting via Intercepts



1. **Visit the location where you will be recruiting.** If this is a corporate setting, you will either need permission, or will need to be discrete. Often, it is better to wait outside an establishment and interact with people coming or going.
2. **Prior to interacting with participants, be sure you understand the logistics of the interactions to follow.** Once you have a participant who has agreed to participate, think about...
 1. Where will you go to conduct your interview?
 2. Do you need a place to sit down?
 3. Will you need a table or work surface? Can you guarantee one will be available?
 4. Will the venue be quiet enough to hear?
 5. Will the lighting be sufficient for the participant to see your materials?
 6. Will the area be discrete enough to discuss sensitive topics?
3. **Approach a participant; smile, and make eye contact.** If there is more than one researcher involved, have only one research approach the participant, while the other researchers remain out of the field of view.
4. **Clearly identify yourself:**
 - Your name
 - Your goal and purpose
 - The time commitment you are looking for
 - The incentive you will offer
 - Any commitment to privacy or anonymity that will be guaranteed
5. **If a participant agrees to participate,** ask them their name, explain that you would like to conduct the interview in a nearby setting, and walk them to the area.

RECRUITING

Method 2: Internal / Organization Recruiting

**Method**

In-house partner helps identify and recruit key participants

Value

Ready-made recruitment pool; identify people you wouldn't have thought to include; reliable screening; familiarity is a motivation to participate

Roadblocks

Familiarity also causes a reluctance to participate/distrust of the promise of anonymity; in-house bias in recruitment pool

RECRUITING

Recruiting with an internal organizational partner



1. Using an internal organizational partner require an existing and strong working relationship. Identify the person or people in the organization that can help you socialize a recruitment screener.
2. Speak with the partners and help them understand what you are doing, why you are doing it, and what you hope to learn.
3. Discuss the internal political risks that may come with supporting a research activity, and help them overcome any reservations about providing help.
4. Give the partner any materials they need to help recruit:
 - Offer to write an email draft that the partner can use to circulate with potential candidates
 - Offer to be CC:ed on each email and to take over any individual communication if there is a positive response
 - Offer a script, if the partner is going to recruit via telephone
5. Make your timeline clear, and indicate that you will remind the partner at several key dates along the way.



RECRUITING

Method 3: External Recruiter

| | Type | Group 1: Denton | | Group 2: Farmers Branch, Irving, Richardson | | | Group 3: Dallas | | | | Group 4: Lancaster, Mesquite | |
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Method

Hire external recruiters to follow a recruitment plan and screener to secure participants

Value

National-reach recruitment; significant time-saver

Roadblocks

Cost; loss of “hands-on,” iterative input over process and participants

RECRUITING

Recruiting with an external recruiter

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1. **Contact a recruiter;** in your initial email or phone call, be specific in describing the profile of your participants, the quantity of participants you need, and the timeline of your research.
2. **If the recruiter feels that they are able to support your effort and provide suitable candidates, they will prepare a bid for the work.** This bid will include a set project management fee, as well as a per-participant fee. When budgeting, keep in mind that this will be in addition to any incentive you offer participants.
3. **Provide the recruiter with your research plan and screener.** Discuss the plan with them and make sure they understand exactly the type of participant you are looking for.
4. **Make your research availability clear to the recruiter;** if you are only able to work during certain hours, or only able to manage a certain number of participants a day, make sure they understand this prior to recruiting.
5. **Provide the recruiter with an Excel or Google Sheets spreadsheet that they can use to track participants.** Make sure that, in addition to the participants profile information, the sheet includes the time and date that the participant will be scheduled.
6. **Make sure that you have day-of-research contact information for the participant, including a phone number and email address.**



RECRUITING

Method 4: Craigslist & Social Sites

The screenshot shows the Craigslist website for Austin, TX. The main navigation bar includes 'create a posting', 'my account', and a search bar. Below this is an event calendar for the current month. The main content area is divided into several categories: community, housing, jobs, services, and discussion forums. Each category has a list of sub-categories. A sidebar on the right shows a language dropdown set to 'english' and a 'nearby cl' section listing various cities in Texas.

Method

Post an advertisement on Craigslist for services or market research wanted

Value

Enormous response rate; a single post with incentive may generate hundreds of responses

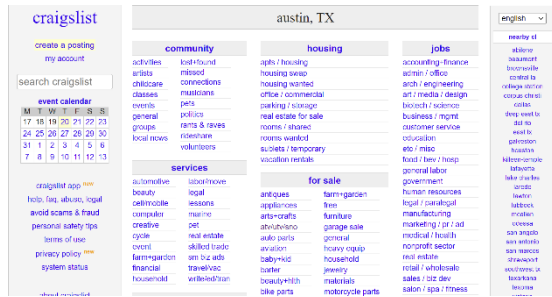
Roadblocks

Many of the respondents will not satisfy your posted criteria; hard to recruit more affluent or specialized participant profiles



RECRUITING

Recruiting with craigslist and social sites



1. Create a temporary email address to use, that you can turn off or ignore when your research is done.
2. Create a temporary phone number (using Google Voice) to use.
3. Post your advertisement. Be succinct, and extremely clear about what you are looking for:
 - What are the characteristics of participants that will be included?
 - What is the time commitment?
 - What is the incentive?
 - What are the requirements for receiving the incentive?
 - How should the participants contact you?
 - What should the participants include in their response, in order to prove to you that they fit your recruiting criteria?
4. Sit back, and watch the emails come in. You will get tens or hundreds of responses.
5. Remove your advertisement when you have filled your required research slots.

RECRUITING

In all cases...

1. Overschedule by at least two participants, to ensure you have coverage if participants fail to show up. If it turns out that you don't need those participants, pay them and let them know they won't need to do anything to receive the compensation.
2. Be very, very organized about tracking participant information, including their scheduled interview times and days.
3. Be sure to have the participant's contact information.
4. Remind the participant two days before the interview.
5. Remind the participant the day of the interview.

- thanks!

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