



Best Practices in Recruitment of Research Participants: A Case Exploration

Dissemination & Implementation Short Course
October 22, 2024

Objectives



- Identify different techniques for recruitment of study participants
- Determine which technique are most appropriate for each project
- Analyze successes and opportunities for improvement in current and past PBRN recruitment strategies

Agenda



- Overview of WREN
- Presentation of case studies
- Small groups to discuss the idea of “matching” recruitment strategies to study types and designs
- Large group meeting to delineate techniques to match projects with different recruitment strategies

The WREN Team



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Wisconsin Research and Education Network (WREN)



- Our mission is to promote and conduct primary care research and education in partnership with primary care clinicians and the communities they serve
- Founded in 1987, WREN is one of the oldest and most respected practice-based research networks (PBRNs) in the United States
- PBRNs are groups of clinicians and practices working together to answer community-based healthcare questions and translate research findings into practice
- As a primary care PBRN, WREN engages clinics in quality improvement activities and evidence-based research

WREN Collaborations



- WREN conducts high-quality research and quality improvement projects in “real-world” family practices across Wisconsin

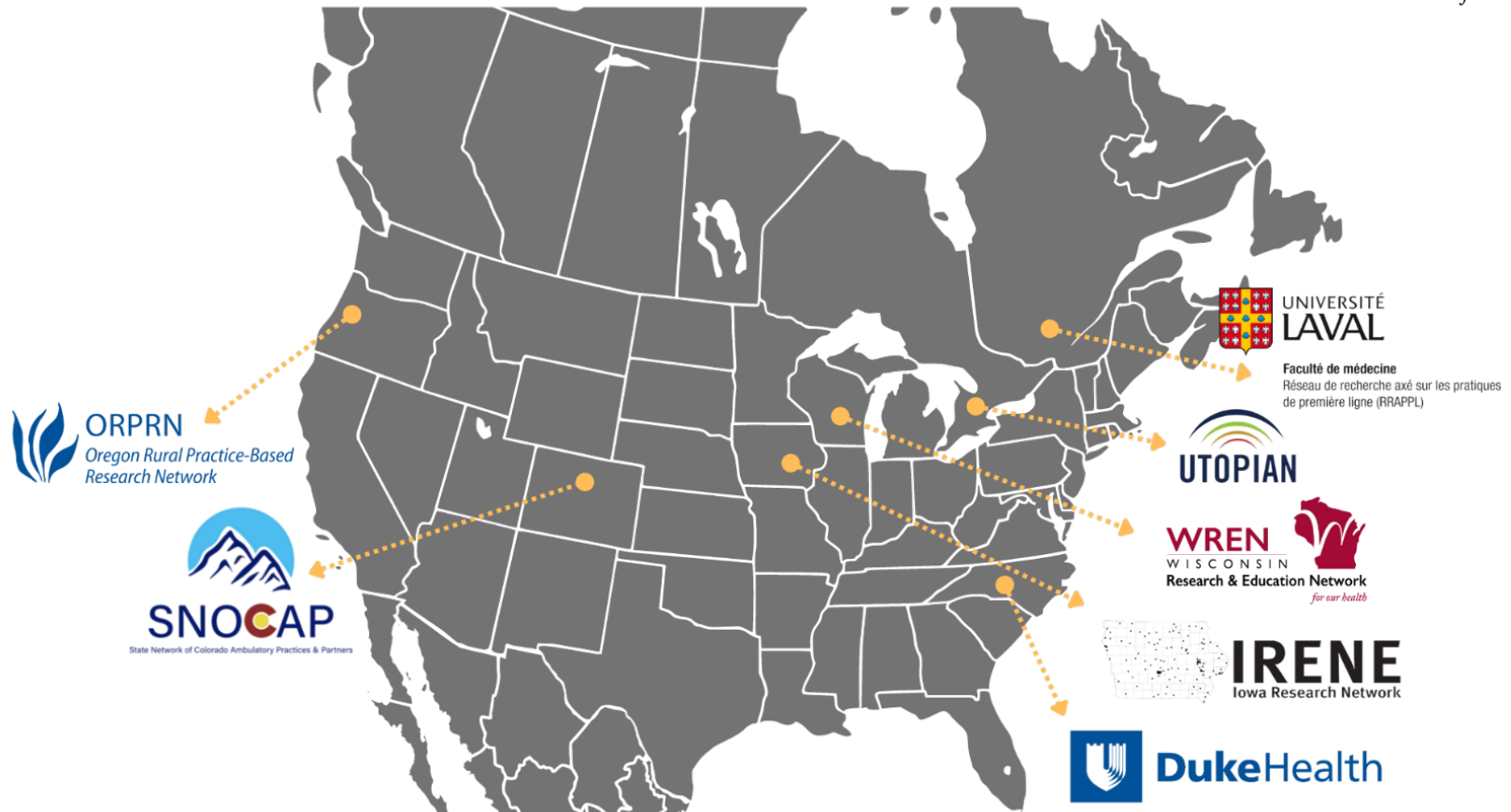


We have collaborated with

- 59 communities
- 35 counties
- 80 clinics
- 37 health systems
- Urban, suburban, rural clinics
- Federally qualified health centers (FQHCs)

We distribute our newsletter to
>1,200 constituents

Meta-network Learning and Research Center (Meta-LARC)



**A network of 7 Practice-Based Research Networks (PBRNs):
5 in the United States, 2 in Canada**

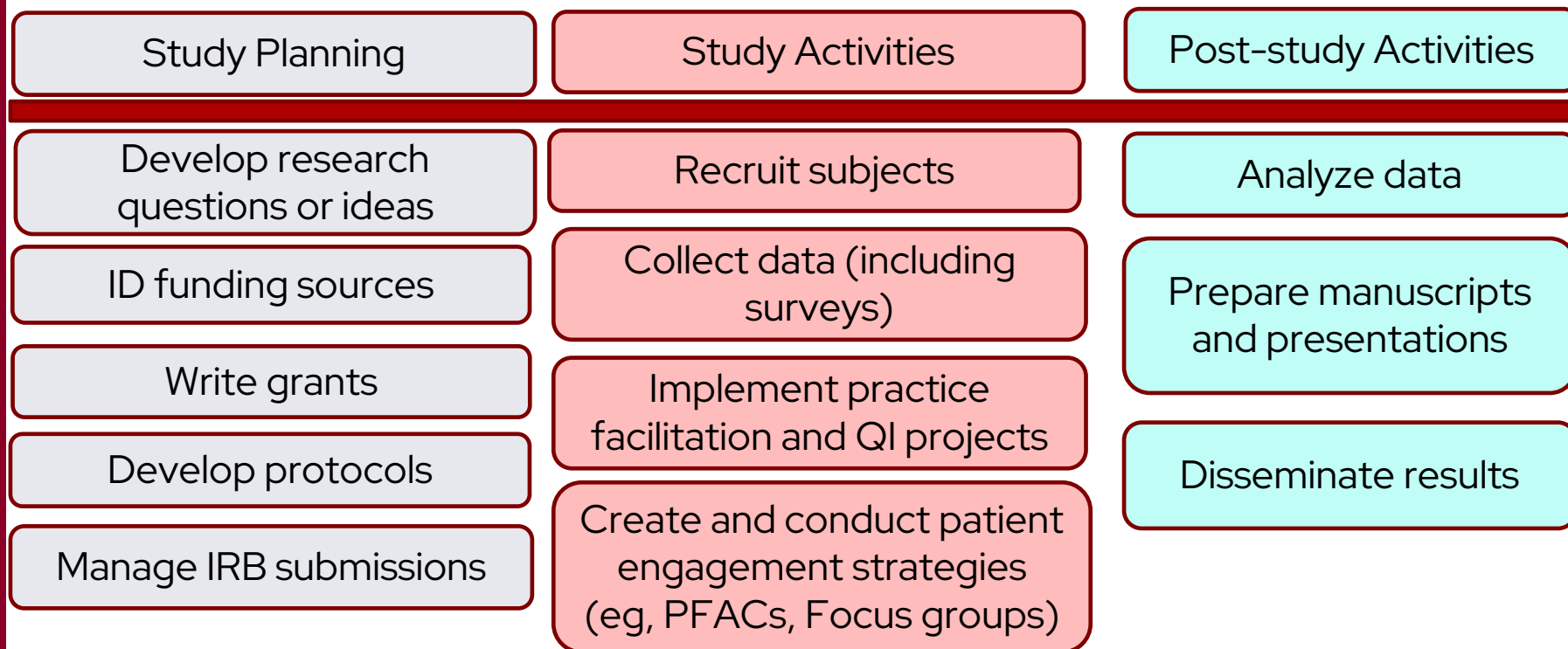


How we can help

We work with

- Primary care clinicians throughout Wisconsin
- A diverse patient population (urban, suburban, and rural clinics)

Collaborate with academic and clinician researchers to conduct:



Recruitment



- Idiosyncratic
- Multiple strategies are often needed
- Importance of flexibility to adjust strategies



Case Study #1



Identifying and Overcoming Local Barriers to Increase Mammography Within a Rural Acute Care Hospital: A Survey and Focus Group Study

Methods

- Participants: Women over 40 living in rural south-central Wisconsin
- Inclusion criteria:
 - Women aged 40 and over
 - Live within service area of partnering health system
 - English speaking
- Potential participants answered screening questions and completed consent verbally on a phone call with research staff

Recruitment

- Social media and website advertising through partnering health system
- Mailed letters from a purchased list of 18,000 women
 - Random selection of 1,800 women residing in health system service area
 - Mailing included survey, pre-addressed stamped envelope & invitation to contact the study team for the focus group





Survey Participants

- 307 respondents (140 online, 167 hard copy)
- 98% self-identified as White
- 42% had a family history of breast cancer
- Most surveyed women reported being engaged with the healthcare system (e.g. 91% reported seeing a healthcare provider in the past year)



Focus Group Participants

- 21 participants in 3 virtual focus groups
- 100% self-identified as White
- Participants placed high value on screening mammograph



Lessons Learned

- Focus groups and survey participants were individuals engaged with the healthcare system and positive view of mammography, which may indicate a participation bias.
- Don't discount "low tech" recruitment such as mailed letters

Phase 2



Increasing Access and Uptake of Mammography Screening in Columbia County: A Focus Group Study

- Rural women who are not connected to the health care system
- Haven't had a mammogram within 2 years
- Includes Spanish-speaking women

Case Study #2



Comparing Primary Care Clinician-Focused vs. Team-Based Implementation of Advance Care Planning



Methods

Primary outcomes:

- Care that corresponds to patient goals
- Time spent at home

Inclusion criteria:

- Has a serious illness(es) or condition(s) likely to limit the patient's life expectancy to less than 2 years
- Is community-dwelling or is planned to be discharged to a community-based setting
- Can speak, read and write in English, French or Spanish
- Has had an initial advance care planning (ACP) conversation at a primary care practice participating in this project

Recruitment

- Clinicians or clinic team members invite eligible patients and/or caregivers to participate (ie, after ACP conversation)
- Patient identification by clinics was key
 - “Surprise” question
 - EMR with age, recent hospitalization, multiple comorbidities, etc
 - Review of patient panel and upcoming visits (eg, patients coming in within the next 1-2 weeks)
- Practice facilitation was used to help clinicians identify patients and remember to offer the study

Inviting patients to the conversation



Ways to invite patients

- Pre-visit letters
- Outreach (clinic newsletter, patient portal, posters in waiting room)
- Follow-up after hospitalization/ER visit
- Point-of-service

Scheduling

- Serious Illness Conversation-focused visit
- Integrated into an existing visit
- Annual Wellness Visit

Lessons Learned

- Practice facilitation helped clinics modify processes to identify eligible patients
 - eg, Adding review of patient appointments to the surprise question
- Staff time for identification of potential participants was a barrier
- Clinicians and clinic teams created ways to remind them to invite patients and caregivers to the study
 - Low tech was often successful, ie, brightly colored cards for the MA

Case Study #3



African American Women's Experiences of Menopause: A Focus Group Study



School of Medicine
and Public Health
UNIVERSITY OF WISCONSIN-MADISON

Methods

- Participants- midlife African American women
- Recruited through word of mouth & snowball sampling
- Inclusion criteria:
 - Self-identify as African American
 - More than a year since last menstrual period (or 45+ with hot flashes or night sweats)
 - Access to computer/tablet and internet for Zoom
- Potential participants answered screening questions and completed consent verbally on a phone call with research staff
- Eligible participants were invited to either complete a short survey by phone or independently online

Recruitment Flyer and Video

Menopause Study

Participants are needed!

Are you an African American perimenopausal or menopausal woman?

If so, you may be eligible for a research study aimed at better understanding African American women's menopause experiences. Your stories will be helpful in educating healthcare professionals to improve women's menopause experience.

You may qualify if you:

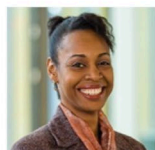
- Are an African American woman AND;
- Are menopausal (no menstruation for one year), **OR** over the age of 45 and experiencing hot flashes/night sweats

Participation involves:

A **90-minute virtual focus group** with 6-8 women and completion of a short survey

Participants will be paid \$100 for their time and contributions. All information is confidential.

Lead Researchers



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Medicine & Community Health
Medical Director - Wisconsin
Research & Education Network

For More Information: Please contact Jennifer Hawkins at 608-225-1640, or email menopause@obgyn.wisc.edu

Facilitators



Focus Group Participants

- 26 African-American women participated in 1 of 4 focus groups
- Ranged in age from 49–70 years old (mean 58)
- 23 of the 26 lived in WI, others in OH, NC, SC
- Weekday, evening groups, held online via Zoom
- Conducted between July 2022 and January 2023
- \$100 compensation for participating in focus group

Lessons Learned



- Importance of having researchers and facilitators from the community
 - Reached out to personal networks
 - Demonstrated that people care about their health concerns
- Video was not effective for recruitment
- Snowball sampling worked very well for these virtual focus groups

Case Study #4



A Pilot Study to Assess the Effectiveness of Direct to Patient Initiation of Continuous Glucose Monitoring (CGM) in Type 1 Diabetes

Methods

Participants

- Adults with type 1 diabetes or type 2 diabetes using basal-bolus insulin therapy (pump or injections) who are not CGM users
- The recruitment target to complete the study is 30; no more than 20% of the target will be T2D

Methods included health system diabetes educator



Recruitment

- Identified eligible patients through EMR
- Letters sent to patients
 - Link to the electronic consent form and website
 - Info on how to contact WREN
 - An opt-out postcard
- For those who did not consent or opt out, WREN staff followed up by phone to share additional information about the study

Successful recruitment of 30 patients in a timely manner!

Subsequent CGM Study

- Clinicians needed to actively opt-in to give permission to send letters to their patients
- Letters to patients were based on EMR eligibility
- Directed patients to online portal for screening, consent, and enrollment
- WREN did not know which participants did or did not go to the portal
- No phone calls by WREN
- Very few queries from potential participants

Less successful

Lessons Learned

- Follow-up phone calls by staff increased rate of enrollment
 - Sending patients to online portal was much less successful
- Enthusiasm for pilot study likely linked to free CGM at a time of no reimbursement
- In the pilot study, family medicine clinicians contacted WREN asking how to enroll their patients or recommended that their patients enroll
- Some clinicians not comfortable opting in to the study with only the virtual diabetes clinic and no health system diabetes educator

Case Study #5



Strategies To Assist with Management of Pain (STAMP) Study: A Randomized Controlled Trial



Methods

- Participants: Adults with chronic low back pain treated with opioid pain medication
- Recruited through mailings, flyers in clinics, and TV ads
- Inclusion criteria:
 - Adults 21+ experiencing moderate to severe chronic low back pain
 - Treated with prescribed opioid pain medication (MED=15+)
 - Willing/able to attend 8 weekly 2-hr Mindfulness Meditation or Cognitive Behavioral Therapy intervention group sessions
- Potential participants answered screening questions by phone
- Eligible participants were consented and enrolled in-person at area clinics

Flyers

looking for more help managing your **chronic lower back pain?**

Are you taking daily pain medications, **but still looking for relief?**
Are you looking for **additional ways** to better manage your pain?

Join our paid research study!

To find out more:

Website: www.STAMPstudy.org

Call: 608-212-6902

Email: STAMPstudy@fammed.wisc.edu



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UNIVERSITY OF WISCONSIN-MADISON

Brochure



where will the study sessions be held?

The study will be held in three cities:
Madison, Salt Lake City and Boston.

Please contact us for details on the location and schedule.

how can I learn more about the study?

To find out more about this study, please contact:

Madison STAMP Study Team
STAMPstudy@fammed.wisc.edu
608-212-6902

or visit www.STAMPstudy.org

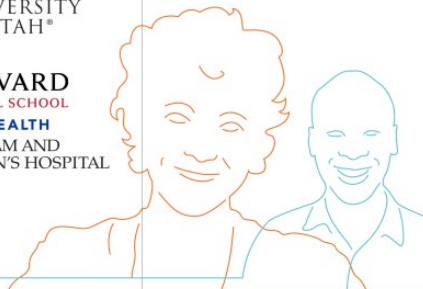


This study is a collaborative effort among the University of Wisconsin (Madison, WI), University of Utah (Salt Lake City, UT) and Brigham and Women's Hospital, Harvard Medical School (Boston, MA).



looking for more help with managing your chronic lower back pain?

become part of a study to **learn new skills** designed for people with back pain



The STAMP (Strategies to Assist with Management of Pain) Study is funded by the Patient-Centered Outcomes Research Institute (PCORI).



STAMP

strategies to assist with management of pain

what is the STAMP study about?

You can be part of an 8-week training program to learn one of two methods that may **help you better cope with chronic lower back pain and live a more fulfilling life.**

One method will teach you to reduce your negative reactions to pain. The other will teach you how to change your thoughts and feelings associated with pain. Your study involvement would be in addition to your medical care.

You will not need to change any of your current treatments or medications.

is this study right for me?

This study may be a good fit if you:

- Are interested in learning new methods designed to help manage your back pain
- Agree to be assigned in a random way (like by flipping a coin) to learn one of two methods to help manage pain
- Are 21 or older
- Experience daily lower back pain for at least 3 months
- Are prescribed daily pain medication for your back pain (like Vicodin®, Percocet®, oxycodone, or morphine)



what would I need to do as a study participant?

- Complete an 8-week training program of weekly 2-hour sessions to learn one of the two new methods taught in the study
- Practice the pain management method at home daily
- Be available for two visits (at the beginning and the end of the study)
- Complete brief online or phone surveys during this one year study

will I be paid?

Yes, you will be compensated for your time and participation, and the therapies offered in the study will be provided free of charge.



TV Ad



Website



STAMP Study : Strategies To Assist with Management of Pain

[STAMP Study Home](#)

[Is STAMP Study for me?](#)

[Study Locations >](#)

[Leadership](#)

[STAMP Study News](#)

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STAMP
strategies to assist with management of pain
a research study for people with chronic lower back pain

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Become part of a study to **learn new skills** designed for people with back pain.

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With one method you will learn to reduce your negative reactions to pain. With the other, you will learn how to change your thoughts and feelings associated with pain.

Your study involvement would be in addition to your medical care. You will not need to change any of your current treatments or medications.

Join the STAMP Study closest to your time zone:

[MADISON, WI >](#)

[BOSTON, MA >](#)

[SALT LAKE CITY, UT >](#)



Response Card

Before feedback
from patient
advisory group

OPT OUT CARD

No, I do not wish to participate in the STAMP study.

If you promptly return this pre-paid card, you will not be contacted by the research team.

Otherwise we will try to contact you in the next 2-3 weeks.

After feedback

Response Card

Yes, I would like to learn more about the STAMP Study and I would like a team member to call or email me.

Best time to call: _____

No, I do not wish to participate in the STAMP study. Please do not call or email me.

If we do not receive this card back, we will try to contact you.

Letters

- Email to university employees
- Provider letter to patients
- PI letter to patients





Intervention and Participants

- 770 adults (21+) with chronic low back pain treated with opioids participated
- Weekday, evening groups, held in-person initially and then virtually due to Covid
- Interventions conducted between September 2017 and March 2021
- Follow-up lasted one year (3, 6, 9, and 12-month)
- Up to \$340 compensation for completing study activities

Lessons Learned

- Patient and family advisory boards can provide valuable feedback on recruitment materials and methods
- Variety of recruitment materials and recruitment locations (clinic and community) were key
- High burden on study staff (cold calls)
- COVID: In-person intervention pivoted to virtual participation which allowed for recruitment from all 50 states

Questions for Small Groups

- Can you identify barriers to recruitment?
- What are factors that make recruitment work better?
- Are there specific characteristics of a study that lead you to choose a particular recruitment strategy?





Thank You!

Questions?