

Recruiting in the Community:

Best practices and tips for community engagement and collaboration



Outline

- Defining your “community”
- Engaging non-OHSU healthcare providers
- Engaging community groups and other stakeholders
- Best practices for community engagement
- IRB and regulatory requirements
- Additional resources

Who is considered “community”?

In this context, any individual or organization outside the institution is considered a community member. Examples include:

- Non-OHSU healthcare providers and organizations
- Community or neighborhood organizations or associations
- Faith and cultural communities
- School systems
- Social or activity groups
- Patient or disease-focused associations or groups

How do I engage non-OHSU healthcare providers?

The best first step is to identify healthcare systems and individual providers in your area that treat the disease or populations your study is focused on. This list could include existing relationships your department has with these providers.

When creating this list, keep in mind that many people seek care outside of the traditional large medical system. Think about who the smaller organizations and community clinics in your area are. To have the broadest recruitment reach, it's best to include the different healthcare types.

Once you've identified the healthcare providers you'd like to work with, consider the 'why' for the provider before reaching out to them. Why will they want to partner? What are you asking of them? How will it impact their clinic, workflow or patients? What is in it for them? By understanding their 'why' or motivating factor, you can better understand how to connect and collaborate with them.

Next, determine the best ways to connect with them. This could include:

- An introductory email or phone call to an identified provider about your study, with an invitation to meet with them to discuss the study and referrals further
- A request to attend a department or clinic's upcoming staff meeting, grand rounds, etc. to give a short presentation on the study, with the hope to identify interested collaborators

What are some ideas for potential healthcare collaborators?

OHSU Health Affiliates:

- [Hillsboro Medical Center](#)
- [Adventist Health Portland](#)
- [Columbia Memorial Hospital](#)

To learn more about bringing your research to an OHSU Affiliate site, visit the Affiliate Research Program [02 page](#) or email AffiliateResearch@ohsu.edu.

Healthcare providers serving the greater Portland and Southwest Washington area:

- [VA Portland Health Care System](#)
- [Kaiser Permanente](#)
- [Legacy Health](#)
- [Providence Health & Services](#)
- [PeaceHealth](#)

Healthcare providers continued:

- [Vancouver Clinic](#)
- [Portland Clinic](#)
- [The Oregon Clinic](#)
- [Multnomah County Health - Primary Care Clinics](#)
- [Neighborhood Health Center](#)
- [Virginia Garcia Memorial Health Center](#)
- [Free Clinic of Southwest Washington](#)
- [Zoom+Care](#)

Rural based healthcare providers:

- Providers that are included in [Oregon Rural Practice-based Research Network \(ORPRN\)](#)
- Specific/individual community hospitals or clinics in towns or regions of interest

Recruitment Methods

Before reaching out to providers, consider what methods the referring provider could engage in. It is best to have some ideas ready before a connection is established.

Recruitment methods with external healthcare providers can include:

- Utilizing their electronic health records (EHR)*
- Direct referrals (e.g. provider gives potential participant study information)
- Study recruitment materials (e.g. palm cards, flyers, brochures) shared in their waiting room, exam rooms, clinic space or available to be handed out during appointments
- Referring provider sends a letter about the study on your behalf to their patients
- Connecting with their institution's patient advocacy or support groups and providing study recruitment materials or a short presentation on the study at an upcoming meeting

*The specifics of this process is dependent on the data source. This process can include, but not limited to, data use agreements, IRB approval from both institutions, and other administrative procedures. For more information, please review the IRB [policies and forms](#) or contact irb@ohsu.edu.

How do I engage community groups and other stakeholders?

Similar to healthcare partnerships, your first step is to identify the groups and stakeholders in your area that serve or interact with the populations your study is looking for. Keep in mind that community groups sometimes only serve those in the neighboring area, so it is best to identify groups and stakeholders across the city to have the broadest recruitment reach.

Once you've identified the community members you'd like to work with, determine the best way to connect with them. This could include:

- Reach out to fellow researchers and contacts in your department to identify if there are existing relationships with this group through your department or institution. Already established relationships can be used for introduction purposes
- If there is no preexisting relationship, determine who the appropriate first contact is. Maybe it is their community liaison or executive director, but it could also be an elder/leader in the community. Many cultural and community groups have specific hierarchies and it is best practice, and culturally respectful, to approach the designated leader(s) first
- An introductory email, letter or phone call about your study, with an invitation to meet with them to discuss it further
 - Buddy check! It's recommended to have a colleague review and provide feedback on communication prior to sending it out to ensure your messaging is understood and received as intended
- A request to attend an upcoming staff or board meeting, employee training, etc. to give a short presentation on the study

Who can I potentially engage and collaborate with?

Community based organizations and associations:

- [Urban League of Portland](#)
- [Immigrant and Refugee Community Organization \(IRCO\)](#)
- [Q Center](#)
- [Impact NW](#)
- [Asian Health & Service Center](#)
- [Native American Youth & Family Services \(NAYA\)](#)
- [El Programa Hispano Católico \(EPHC\)](#)
- [Latino Network](#)
- [YWCA of Greater Portland](#)
- [YMCA of Columbia-Willamette](#)
- [Portland Parks & Recreation Community Centers](#)
- [Vancouver Parks, Recreation & Cultural Services](#)
- [Neighborhood House](#)
- [Friendly House](#)

Collaboration continued:

Other community stakeholders:

- School systems (Head Start, preschool, primary, secondary, post-secondary)
- Language schools
- Cultural and faith communities
- Language and cultural related groups
- Social and activity groups geared toward population and/or disease (e.g. parenting group, Portland Diabetes Meetup Group)
- Disease associations, support and advocacy groups
- Patient advisory boards
- Civic organizations
- Chambers of commerce or local business associations
- Employee associations of large companies
- Other organizations serving the community

Recruitment Methods

Once a connection is established, it is time to consider and discuss what methods the community group(s) and other stakeholders will participate in. Recruitment methods with community members can include:

- Attending or having an informational table (i.e. “tabling”) at an upcoming event, providing information about the study to attendees
- Short presentation on the study at an upcoming meeting, class, event, activity or faith service
- Study flyers displayed on community bulletin boards, in their general meeting/event space, and handed out at meetings or events
- Announcements or ads in their newsletters
- Email blasts to their listserv about the study
- Letter to their clients or stakeholders about the study (e.g. letter from school to parents/caregivers)
- Sharing the study on their social media channels
- Referrals and introductions to other organizations to engage and collaborate with

Best practices for working with the “community”:

- Start the conversation early. Don’t rush. Allow enough time to fully explain the study and for the collaborator to ask any questions they have. Ensure you adequately answer their questions and address stated concerns. It is recommended to take these concerns into consideration with the study design and recruitment methods.
 - Study participation concerns can include travel, transportation costs, time requirements, financial costs (e.g. if uninsured), and the need for language services and translated materials.
- Remember that these are their patients, students, community members, etc. that they have established relationships with, they have a vested interest in them.
- Listen and be open to the community voices and feedback. They are the experts on themselves and who they serve. Learn from them on how to best interact with that community organization/person.

- Be aware of the policies and procedures surrounding research and recruitment at/from your chosen community setting. Many organizations have application processes or procedures to complete before working with them. Additionally, determine if there are other stakeholders that you need the buy in and support of in these processes.
 - For example, if you are looking to collaborate with the local school system, you may not only need the approval of the School District, but also the Parent Teacher Association (PTA).
- Keep collaborators consistently updated on the study and any changes, progress and outcomes. This helps to build trust and foster the relationship.
- Consider this collaboration an ongoing effort and relationship that benefits research overall, rather than a recruitment method to help only one study.
- Send a thank you note. By acknowledging the time and effort they took to refer, it helps to encourage them to refer again.

Healthcare specific best practices:

- Reassure them that you are looking to collaborate on research and not looking to take patients from their clinical care setting. Losing patients is often a concern for referring providers.
- Make it as easy as possible for the external provider to refer patients. This could include easy access to inclusion/exclusion criteria, providing them referral forms to submit, a designated phone number or email address for referrals, and other measures that expedite the referral process.

Community group specific best practices:

- Trust, respect, and visibility are big components to community collaboration. Consider how you can incorporate this into the team's actions and engagement with the community.
- Add value to the community. This should be a mutually beneficial relationship. It is not only about the study getting what it wants, but how does your team contribute back to the community.
 - Ideas can include volunteering with their organization, attending their events (for visibility and support only, not for recruitment), and sharing study results back.
- Present the study information and recruitment materials in ways that are appropriate and representative to the population(s) you are trying to reach. Think about the location, motivation, ages, and backgrounds of the individuals you are engaging with as you prepare and create materials.
 - For example, study materials and presentations would be different for a disease association than it would for a primary school.

IRB & Regulatory Requirements

IRB review and approval is required prior to beginning any recruitment activity. Your IRB approved protocol should describe your recruitment methods.

For collaboration with outside providers and groups, additional review and approval may be required. To learn more about IRB requirements for engaging with the community, please review the IRB [policies and forms](#) or contact irb@ohsu.edu.

If you or your study team will go off site, be sure to obtain off site authorization.

For a full listing of OHSU IRB requirements, please visit the [OHSU IRB website](#). For additional information and questions, please email irb@ohsu.edu.

*Please note, these IRB guidelines are only for studies where OHSU IRB is the IRB of record.
If another IRB is the IRB of record (e.g. the VA, a central IRB), please email irb@ohsu.edu for specific policies and procedures.*

Additional Resources

OHSU ORPRN: Research and Programs

<https://www.ohsu.edu/oregon-rural-practice-based-research-network/research-and-programs>

OHSU Knight Cancer Institute: Community Programs & Partnerships

<https://www.ohsu.edu/knight-cancer-institute/community-programs>

OHSU OCTRI: Community Research Hub

<https://www.ohsu.edu/community-research-hub>

Recruitment Innovation Network: Referring Providers: An Outreach Guide

<https://trialinnovationnetwork.org/material-details/?ID=85>

Recruitment Innovation Network: Community Outreach Guide

<https://trialinnovationnetwork.org/material-details/?ID=86>

PCORI: Engagement Plan Template

<https://www.pcori.org/sites/default/files/PCORI-Updated-Engagement-Plan-Template.pdf>

For more information, additional resources, and to request a recruitment consultation, please visit our [webpage](#) or email us at octrirecruitment@ohsu.edu



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