**Recruitment Strategy and Budget Planning Worksheet**

PI:

Protocol Title:

IRB number:

Date:

Projected Recruitment start date:

Projected Recruitment end date:

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Recruitment Method** | **Existing Records/**  **samples** | **Normal Controls** | **Specific Diagnosis** | **Adult Participants** | **Pediatric population** | **Vulnerable population** | **Effort (hours)** | **Time to Implement** | **Provider** | **Total Cost** |
|  |  |  |  |  |  |  |  |  |  |  |
| Billing records |  |  |  |  |  |  |  |  |  |  |
| Brochures/pamphlets |  |  |  |  |  |  |  |  |  |  |
| Chart/lab reviews |  |  |  |  |  |  |  |  |  |  |
| ClinicalTrials.gov or other internet listings |  |  |  |  |  |  |  |  |  |  |
| Community outreach:   * Participate in * support groups * Present useful information at community events |  |  |  |  |  |  |  |  |  |  |
| Craigslist listing of study |  |  |  |  |  |  |  |  |  |  |
| Direct contact by Coordinator |  |  |  |  |  |  |  |  |  |  |
| Direct contact by PI |  |  |  |  |  |  |  |  |  |  |
| E-mail |  |  |  |  |  |  |  |  |  |  |
| EMR review |  |  |  |  |  |  |  |  |  |  |
| External collaborators |  |  |  |  |  |  |  |  |  |  |
| External flyers |  |  |  |  |  |  |  |  |  |  |
| External lectures |  |  |  |  |  |  |  |  |  |  |
| External posters |  |  |  |  |  |  |  |  |  |  |
| External web ad |  |  |  |  |  |  |  |  |  |  |
| Facebook page |  |  |  |  |  |  |  |  |  |  |
| Foundations:   * Ads in newsletters, e-mails, social media, etc. * Participate in events, talks and other educational initiatives * Attend disease-specific meeting |  |  |  |  |  |  |  |  |  |  |
| Internal Communication:   * Reminders at department meetings * Educate department on study * Provide inclusion/   exclusion criteria and/or contact cards |  |  |  |  |  |  |  |  |  |  |
| Internal flyers |  |  |  |  |  |  |  |  |  |  |
| Internal posters |  |  |  |  |  |  |  |  |  |  |
| Infoscope news |  |  |  |  |  |  |  |  |  |  |
| Froedtert Today |  |  |  |  |  |  |  |  |  |  |
| Mail |  |  |  |  |  |  |  |  |  |  |
| Newspaper |  |  |  |  |  |  |  |  |  |  |
| Phone call |  |  |  |  |  |  |  |  |  |  |
| Physician to physician letter |  |  |  |  |  |  |  |  |  |  |
| Postcards |  |  |  |  |  |  |  |  |  |  |
| Press release |  |  |  |  |  |  |  |  |  |  |
| Radio ads |  |  |  |  |  |  |  |  |  |  |
| Research Recruitment Registry |  |  |  |  |  |  |  |  |  |  |
| Referral from physician |  |  |  |  |  |  |  |  |  |  |
| Targeted patient letter |  |  |  |  |  |  |  |  |  |  |
| Television ads |  |  |  |  |  |  |  |  |  |  |
| Twitter notice of study |  |  |  |  |  |  |  |  |  |  |
| Youtube video |  |  |  |  |  |  |  |  |  |  |
| Word of mouth |  |  |  |  |  |  |  |  |  |  |
| ResearchMatch.org |  |  |  |  |  |  |  |  |  |  |