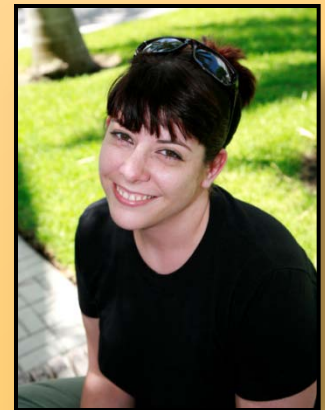


2010 Web Seminar Series

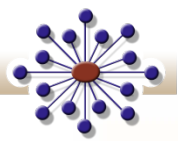
Recruitment and Retention Success

Laurel Hall, M.Ed.



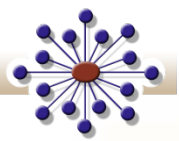
Produced by Liz Buttrey, NIDA CTN CCC Training Office

"This training has been funded in whole or in part with Federal funds from the National Institute on Drug Abuse, National Institutes of Health, Department of Health and Human Services, under Contract No.HHSN271200522081C."



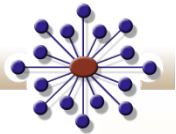
Training Outline

- Building facility and personal rapport
- Bridging the gap between theory and field experience
- Preparing to recruit
- Following through to assure study follow up
- Diagnosing and addressing barriers collaboratively
- Discussing traditional and non-traditional approaches and tools



Rapport Building with Site and with Study Staff

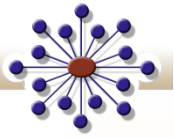
- Rapport at every level
 - Consider rapport contagious
 - Organizational level
 - Scheduling and space allocation
 - Identify the person who knows what is going on at the site
 - Which staff will you be working with
 - Who will help you connect with clients
 - Whose workspace will you be sharing
 - Whose equipment will you be using
 - Whose services will you be using
 - PI and director level
 - Friendly and collaborative



Bridging the Gap Between Theory and Field Experience

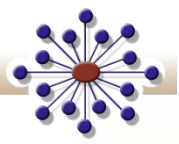
- Intensive communication and understanding of various research staff
- Staff Motivation
 - Ongoing education regarding purpose
 - Reduce interviewer burn-out
- Understand basic research principals
 - Value of follow up retention rates
 - Internal validity
 - External validity
 - The study outcomes
 - What are you trying to do here?
 - Control vs. Intervention groups
 - Treatment as usual is not a client disservice
 - Ongoing clarification of treatment arm protocols
 - Adjusting skill set paradigm
 - How are you using your skills here?

Poll!

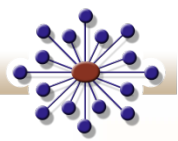


Diagnosing and Addressing Barriers Collaboratively

- Regular communication
 - Clinic staff
 - Research team
 - Team meetings and calls to brainstorm potential barriers and solution
- Clear documentation of participant interactions
 - Helps identify pattern, problems
 - indications of possible protocol adjustments
 - Enables predictions
 - Target for appropriate strategy

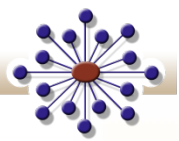


Preparation and Tools



Preparing to Recruit

- Intricate Recruitment and Retention MOP
 - Include all tracking forms
 - Locator forms
 - Recruitment logs
 - Database
 - Site specific recruitment modifications
 - Recognition that environments are unique
 - Where you are going to recruit at this site
 - How are you gaining access to clients at this site
 - IRB requirement variation
 - Staffing Allocation
 - Procedure walk through or role play
 - Identifies critical components



Preparing to Recruit

continued

■ Roles and Responsibilities

□ Staff responsibility matrix

■ Who is doing what?

□ Cross Training

■ Who is backing up whom?

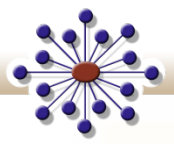
■ Reducing burn-out

□ Mix it up

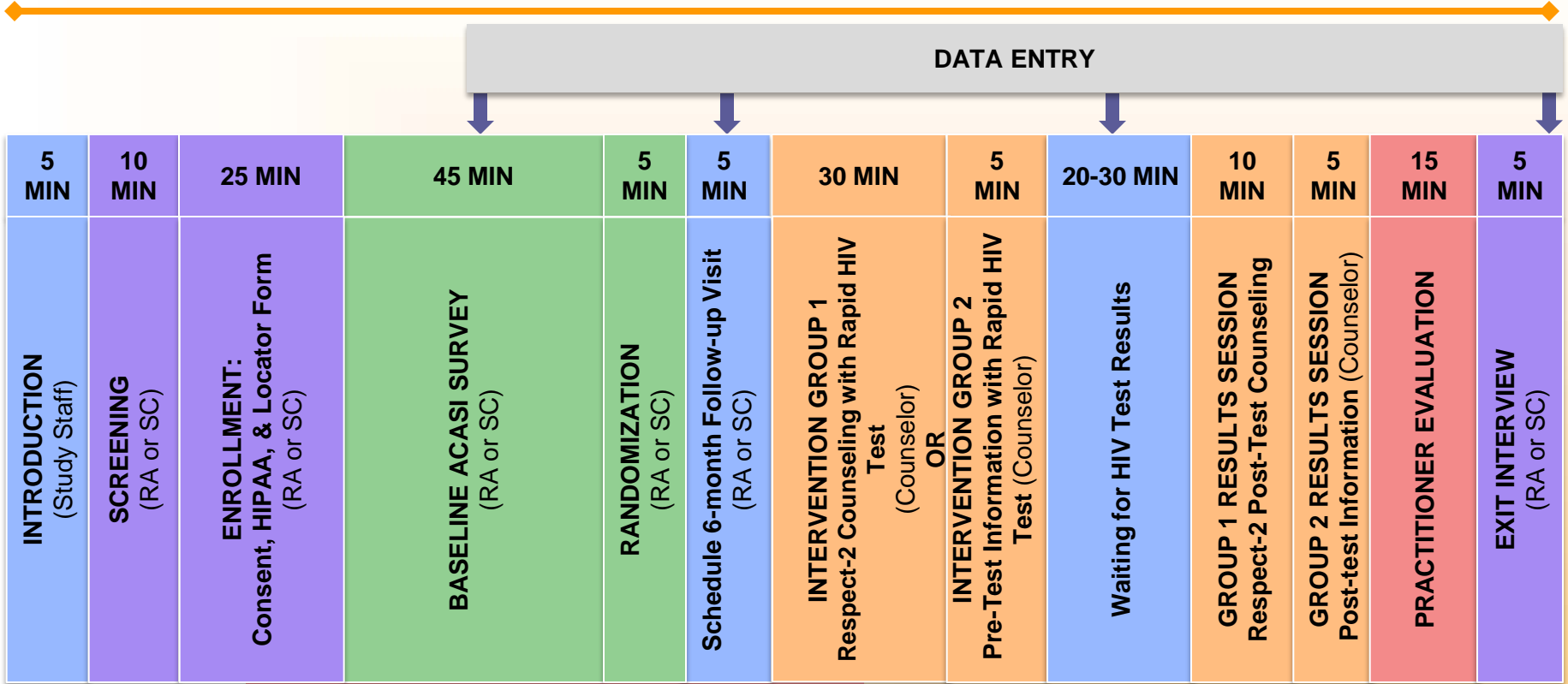
□ Keep up to speed

□ Keep variety

	Site Coordinator	RA (full time)	RA (part time)	Study Counselor
Recruitment	X	X	X	Backup
Screening	X	X	X	Backup
Consent		X	X	Backup
Baseline	X	X	X	X
HIV Testing				X
Intervention	Backup		Backup	X
Record Abstraction	X	X	X	X
Retention Calls	Backup	X		X
Follow-Up Visit	Backup	X		X



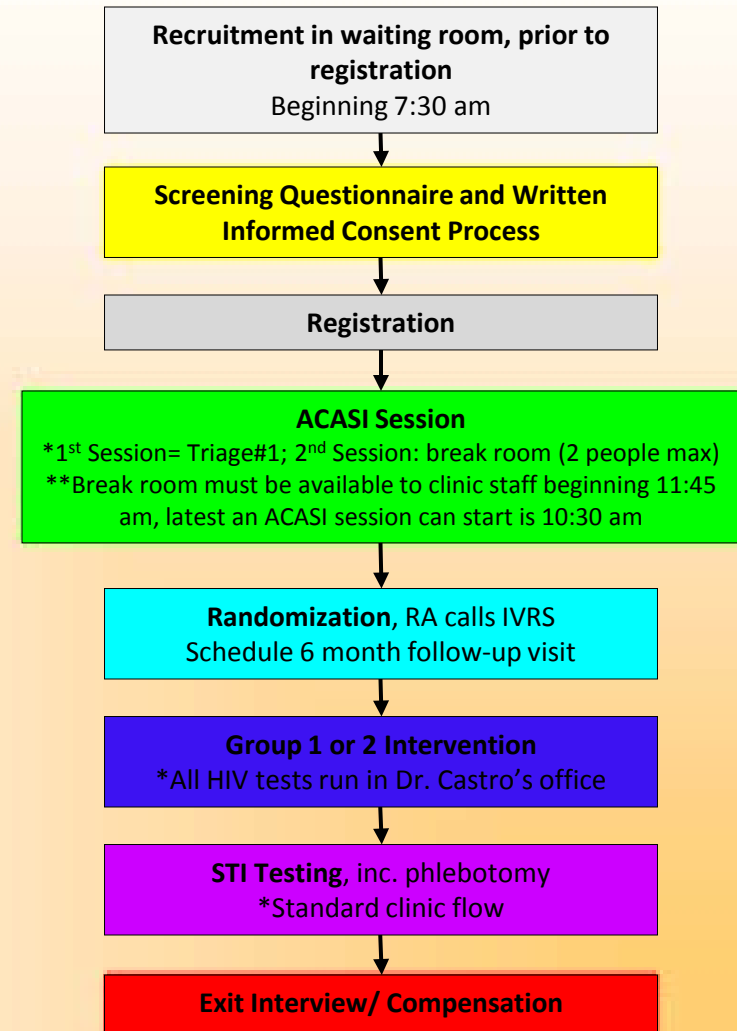
Time and Space Organization

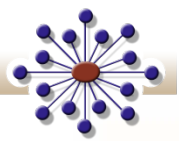


BASELINE STI TESTING
(Nurse or Clinician)

- LEGEND**
- Semi-Private Space (i.e. empty hallway)
 - Examination Room
 - Private/ Unsecure (accompanied, i.e. office)
 - Private/ Secure (unaccompanied, i.e. break room)
 - Private Intervention Space (i.e. office or breakroom)

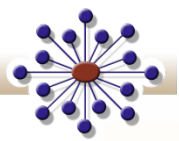
Time and Space Organization





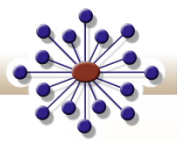
Tracking Recruitment and Retention

- What programs do you have available?
 - MS Excel
 - MS Access
 - E-mailed attachments
 - When centralized platform is unavailable
 - Customized program
 - Database programmers
 - Online
 - Web designers
 - Secure hosting
 - Know IRB requirements for storage & transfer
 - Keep it user friendly



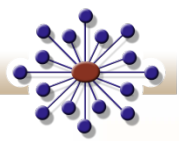
Website Users

- Who are your users?
 - Site staff end user
 - Skill set/knowledge level
 - Real-life, active testing
 - Hear their requests & opinions
 - Upper-level, management end user
 - Skill set/knowledge level
 - Web and database functionality
 - Stakeholder liaison



Website Specifications

- Website is the conversion from the source document to the database
- Design should mirror source document
 - Logical and efficient use



Website Tracking

Important Dates

You Can [Logout](#)

STI Test Abstraction Deadline

Six Month Window	
Opens	11/09/2010
Target	11/17/2010
Closes	01/12/2011
Appt. Date	

VIEWING MODE [Edit Participant](#) -> [Delete](#) (-)

SCREENING (Hide Details)

Participant ID: 00:0000 Date Screened : 05/20/2010

Age: 18 - 29 Drug Use:
 Check all that apply: ...

Race: Hispanic: No

Check all that apply: ...

Sex/Gender: Transmale (female to male) Sexual History:
 Check all that apply: ...

Reason For Visit:
 Check All That Apply: ...

Eligible to Enroll: Yes Ineligible to Enroll:
 Check all that apply: ...

Randomized: Yes Reason not randomized:
 Check All That Apply ...

Ineligible AND Randomized
(consult QA Monitor)

Baseline Activity Due & Completion Dates

BASELINE (Hide Details)

Date Written ICF Signed: 05/20/2010

ACASI Baseline Deadline: 05/27/2010

ACASI Baseline Completed: 05/20/2010

Randomization Deadline: 05/27/2010

Randomization Completed: 05/21/2010

Study Group: Arm 2(No Counseling)

STI Testing Deadline: 05/28/2010

STI Testing Completed: 05/21/2010

HIV Rapid Test Performed: Yes

HIV Rapid Fingerstick Result: Indeterminate

HIV Oral Confirmatory Test: No

HIV Oral Confirmatory Result: - Select -

Confirmatory Results received: - Select -

Exit Interview Completed: 05/21/2010

STI Test Abstraction Deadline: 06/25/2010

STI Test Abstraction Completed:

6-MONTHS (Hide Details)

6-Month Window Opens: 11/09/2010

6-Month Target Date: 11/17/2010

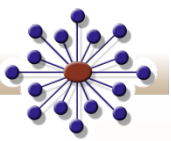
6-Month Window Closes: 01/12/2011

6-month Appointment:

Lead Team Permission Granted

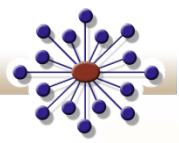
6 Month Window





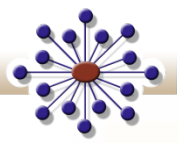
Tracking Recruitment and Retention

- What do you need to track?
 - What do you need daily, weekly, for DSMB meetings?
 - To whom do you need to report?
 - How can sites benefit from tracking?
 - Participant windows
 - Deadlines
 - List of incomplete activities
 - Who has appointments



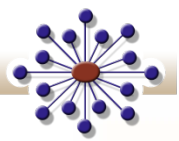
Tracking Elements

- Screening date
- Eligibility Status
- Randomization Status
- Participant demographics
- Appointment date schedules
- Automatically calculated windows
- Activity deadlines
- Activity completion



Data Entry Timing

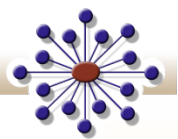
- Every day by COB
- Integrate into local SOPs
 - Recruitment
 - Enrollment
 - Baseline
 - Participant compensation (exit interview)
 - 6month follow-up scheduling



Automatic Reports

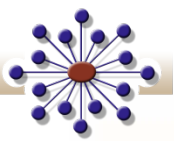
- Recruitment
 - Total recruited
- Screened/enrolled but NOT recruited
- Retention
 - Reminder contact dates
 - Missed reminder contacts
- 6-Month Follow-up
 - Appointments coming up
 - Missed appointments





Daily Reporting

DAILY REPORT						
	ACROSS SITES	SITE 01	SITE 02	SITE 03	SITE 04	SITE 05
Launch date		04/01/10	04/02/10	04/05/10	04/09/10	04/09/10
Screened This Week	190	13	24	22	20	21
Screened to Date	1975	230	290	228	232	224
Randomized Last Week	166	21	20	19	18	22
Randomized This Week	140	13	18	22	12	18
Randomized to Date	1523	183	228	210	175	181
% of Target Randomization Complete	30%	33%	41%	38%	31%	33%
# Remaining to Randomize	3477	373	328	346	381	375
Projected Weeks to Finish (04/01/10 launch, @18/wk)	21	21	18	19	21	21



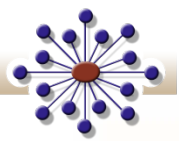
Screening & Randomization Reporting

Weekly Report	Totals	Week of 04/19/10-04/26/10				
	ACROSS SITES	SITE 01	SITE 02	SITE 03	SITE 04	SITE 05
Launch date		04/01/10	04/02/10	04/05/10	04/09/10	04/09/10
Approached this week:	386	46	50	49	46	39
Screened this week:	147	17	30	10	25	18
% of approached screened	38%	37%	60%	20%	54%	46%
Screened to Date:	361	63	84	54	53	40
# Eligible to Date	292	51	69	44	40	35
% of screened eligible	81%	81%	82%	81%	75%	88%
Randomized to Date:	273	46	65	44	38	34



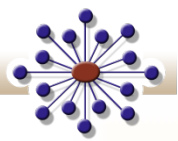
Demographics Reporting

Weekly Report	Totals	Week of 04/19/10-04/26/10				
	ACROSS SITES	SITE 01	SITE 02	SITE 03	SITE 04	SITE 05
Randomized to Date:	273	46	65	44	38	34
Age Total	126	38	41	36	25	30
2 (18 – 29)	53%	47%	59%	50%	36%	57%
	67	18	24	18	9	17
3 (30 - 39)	22%	29%	20%	17%	24%	33%
	28	11	8	6	6	10
4 (40 – 49)	12%	16%	15%	11%	20%	7%
	15	6	6	4	5	2
5 (50 – 59)	11%	5%	7%	19%	16%	3%
	14	2	3	7	4	1



Site Specific Report

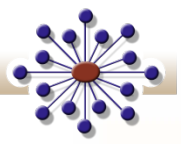
- Website should benefit site team
 - Reward for data
- Site-specific, automated report
 - What will be useful
 - Upcoming appointments/window periods
 - Tracking time sensitive tasks
 - Automatic, up-to-date recruitment status checks
 - Retention activities



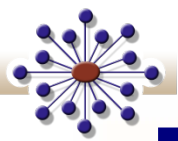
Retention Tracking

- Monthly contacts
 - Reminder letters
 - Reminder calls
- Participant locator confirmation contact
- Comments: additional information on that participant that may help further retention attempts
- Recruitment Coordinator Can
 - Track to individual level to keep teams on target
 - Liaison between teams to share ideas and strategies
 - Offer retention quality assurance



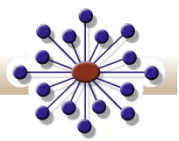


Strategy Development



External Factor Identification

- Who is your population?
- How transient are they?
- How transient are their social circles?
- What are their patterns?
 - Living with family or friends
 - Living in shelters or on the street
 - Incarceration or treatment facility
 - Restricted areas
 - Assigned case workers or parole officers



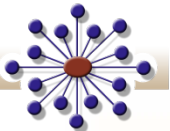
Response Strategies

- The harder they are to reach – the more touch points needed
- Where are their drift-back points?
 - Patterns
 - Visiting family, relapsing, seeking treatment, incarceration
- Prepare contact resources ahead of time
 - Legal status information
 - Incarcerated, parole, awaiting hearing
 - Penal facility, shelter and treatment facility administration



Following-through to Assure Study Follow-Up

- Your study is not your participants' priority – **It's yours**
- Know your individual participants
 - Who needs extra attention
 - Build a case file
 - Keep clear, individualized notes
- Keep constant communication build and maintain the relationship
 - With participant
 - They need to know you are thinking of them
 - With their contacts
 - They need to trust you. They need to like you. They need to be your ally.



Protocol Adherence Drift

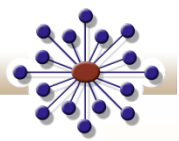
■ Prevention

- Reports to help stay on top of things
- QA monitors identify developing problems
- Staff meetings to address procedures, challenges and achieve unity of understanding
- Procedure observations
 - Visit walk through, session recordings or observations
 - Helps identify issues or recalibrations needed

■ Refinement

- MOP as an actively refined tool
 - To clarify and address ongoing modifications or unforeseen situations
- Re-training





National Drug Abuse Treatment

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<http://ctndisseminationlibrary.org>

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