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Linda Cabral, Laura Sefton, and Kathy Muhr on Recruiting People with Mental Health 
Conditions for Data Collection

Hello! We are Linda Cabral, Laura Sefton and Kathy Muhr from the Center for Health Policy and 
Research at the University of Massachusetts Medical School. We recently completed an 
evaluation project that involved recruiting people with mental health conditions to participate in 
individual interviews, focus groups, and surveys regarding their experiences with a mental 
health peer specialist training program. In 2010, Woodall and colleagues reported that many 
barriers exist to participating in mental health research, including:

- fear
- suspicion and/or distrust of researchers
- concerns about confidentiality
- transportation difficulties
- severity of illness
- inconvenience
- fear of relapse as a result of participation
- the stigma of mental illness

We wanted to share some tips and lessons learned to address some of these barriers.

**Hot Tip:** Get approval. Before starting data collection, consider applying for Institutional Review 
Board (IRB) approval. While many evaluations for program improvement purposes do not 
require IRB approval, if you wish to disseminate your findings to a broad audience, this approval 
may be necessary to insure that recruitment efforts take into consideration an IRB’s 
requirements for working with vulnerable populations.

**Hot Tip:** Establish trust. To establish trust, the evaluation team members visited the training 
program and were introduced as people who would be in contact after the training was 
completed to get their feedback on the training. This informal introduction by a trusted source 
paved the way for outreach later on.

**Lesson Learned:** Use a script. Having a telephone script was a good tool for initiating a 
conversation or leaving a message with the intended participant. It helped us to remember to 
cover key points with potential participants. It also reinforced our concern for their confidentiality 
as we avoided sharing information with others when leaving a message.

**Lesson Learned:** Be transparent. Once we contacted the participant, we were transparent 
about the purpose of the evaluation, who was funding it, and how their information would be 
used.

**Lesson Learned:** Provide multiple access points. To increase survey response rates, we 
brought copies to all in-person interviews, allowing time after the interview for participants to 
complete the survey. If they required assistance, we were present, and able to do so in real-
time.
Lesson Learned: Be flexible. To increase our recruitment rate, we were flexible in our interview and survey administration formats. When possible, our first preference was to conduct in-person interviews at a time and place of the person’s choice. When this was just not feasible or could have led to a decision to not participate, we offered to conduct the interviews and survey data collections over the phone.