Educational Research Recruitment Guide

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Recruitment Guide

Introduction

This guide is for LXD Research clients to support study recruitment. Whether you're a global ed company with a portfolio of products or small educational product business with a targeted geographic or grade band, the process of identifying and partnering with school districts for study of your products is fundamentally important to the future scope and success of your study. This guide gives you the information that you need to identify and leverage the relationships you have with your customers and turns customers into research partners. As you move forward in the recruitment process, please contact research@charlesrivermedia.com with any questions. If recruitment support is not currently included in your scope of work, reach out and discuss options for additional recruitment services.

Recruiting research partners is a team effort and can take many months from start to finish. Assemble a cross-functional team of people with knowledge of customers, company goals, and the target product to help guide the process and your research team.

Sample Recruitment Timeline

1-2 Weeks	1-2 Months	2-6 Weeks
Define Goals	Invite Administrators	Memo of Understanding
Sketch Criteria	Meet with Leaders	Data Sharing Agreement
Brainstorm Potential Partners	Agree to Partner	Study Begins

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Design

From the start, ESSA evidence levels depend on the design of the research. The goal for the ESSA level will inform which customers to approach for recruitment. While not required, it usually makes sense to choose a district or school that is new to the program (or at least have students who are new to using the program) for Levels 1 and 2.

ESSA Level Design Elements

ESSA Level 1 Evidence	ESSA Level 2 Evidence	ESSA Level 3 Evidence	ESSA Level 4 Evidence
Schools or classrooms are **randomly selected** to use product, unselected group does not	Schools or classrooms are **chosen** to use product, similar group does not	**All** schools or classrooms use the product	Logic Model with case studies or testimonials from users
Treatment vs. Control Groups	Treatment vs. Comparison Groups	Treatment Group only	No Student Groups

Research Activities

Recommended
- Data sharing
- Survey
- Interviews

Additional Helpful Activities
- Observations
- Intervention logs
- Focus Groups

Note: Case studies could be limited to data sharing and administrator interviews.

Criteria

There are so many ways to design a study, for samples large and small. Here are some criteria to consider as you begin identifying potential partners.

Engagement   *Size*   *Assessments*   *Length of Intervention*

- Student success with your products!
- Over 350 students per condition is required to get a "Strong" or "Moderate" label (750 total students). Evidence for ESSA allows combining studies.
- More students is better (30+ students per grade is the absolute minimum)
- District ability to share student-level data is necessary, can be de-identified
- Assessment used is common or well-known (must be a third-party tool)
- Need to be utilizing program for at least 12 weeks

Process LADDER

So how does my company recruit a research partner? Climb the Process LADDER!
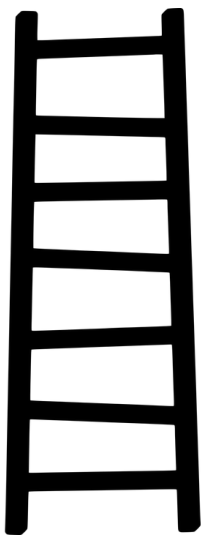
- **Listen** for stories or conversations that tell you a customer may be interested or open to a research partnership
- **Ask**: Prepare a recruitment letter to initiate conversations
  - Include the ESSA Level evidence and design details in this first contact
  - Include any benefits that the district will receive for participating (see ideas below)
  - Ask for a meeting to discuss
- **Designate** a single point of contact from the company to handle emails and arrange meetings.
- **Deal**: Get the agreement on paper to gain understanding for both parties (an MOU) and facilitate permissions for data sharing
- **Execute** the research study activities as discussed in the MOU
- **Report** and share the story!

> **What kind of benefits should I offer to incentivize districts and/or teachers?**
> There are many ways to provide monetary support to school districts for participation:
> - Free training opportunities
> - Free product or licenses
> - Discounts on future purchases
> - Gift cards for interviewees or focus group attendees
> - Gift card raffle for a sample of survey participants

Other Considerations

As a company's body of research increases, consider the whole portfolio of work you will be building. If you already have a study on the west coast, try to recruit a site on the east coast. If you already have a district that has a large percentage of Hispanic students, consider a district with mostly non-Hispanic students. Here are characteristics to consider:

- Product type (intervention products need more schools, because there will be fewer students using the product in each school
- Product fidelity of use
- Size of the schools and sites
- Geographic location
- Demographic profiles
- Teacher training or knowledge in domain (i.e., science of reading) or product itself

Contact Us to Partner

Thank you for your support in recruiting sites for the research studies! The right school partner can make all the difference in meeting your goals. Please reach out with any questions or if you would like additional support: research@charlesrivermedia.com.

Sample Recruitment Letter

SUBJECT: Unique Opportunity to Participate in a Research Project

Dear [NAME],

The [COMPANY] team would like to thank you and your colleagues at [DISTRICT] for your continued use of our [PRODUCT]. Knowing that there are many resource options available to you, we are delighted that you have chosen [PRODUCT] to support your educators and students.

[DESCRIBE GOAL OF RESEARCH STUDY.] As such, we will be conducting a study that focuses on the effectiveness of our [PRODUCT] in order to understand its impact and inform future development efforts to best serve schools like yours.

We would like to offer you the opportunity to participate in this study. Participants will receive:
- [BENEFIT 1]
- [BENEFIT 2]
- [BENEFIT 3]

For further details about the study and the terms of involvement, please see the attached document*. We hope you'll take advantage of this unique opportunity to help us forge the future of [PRODUCT]. If you're interested or have questions, please contact [contact information] to arrange a meeting by [DATE}.

Thanks in advance for your consideration.
Sincerely,

*Research Overview Letter can be attached, if the design and benefits have been predetermined.

Recruitment Brainstorm Worksheet

Once you have considered the ESSA Level you are recruiting for, start with the largest districts that you know. From there, consider how the timing and scope of the study will be compatible with the design. Variables affecting the study might be district calendar, leadership changes, past history of research partnerships, etc. To get started, brainstorm here.

New customers who may allow school selection and exclusion

Current customers who are not yet district-wide

Current customers who are using the product well. For example, the customers may be performing well on state assessments, be reporting good teacher feedback, expanding their purchase of your products to include more grades or add-ons, etc."

Current customers who want to improve their product implementation

Potential Research Partner Recruitment Worksheet

Once you have a set of customers to consider for participation in your study, collect the following information on each one from sources, which may include your customer management system or district websites, to understand the range of criteria each may cover. It may be helpful to copy and paste this list into a spreadsheet for collaboration.

District Name	
Number of Schools	
Size of Schools	
Geographic location	
Demographics of district	
Grades included	
Total number of students per grade level	
Implementation level (new, some schools, most schools, all schools)	
Implementation quality	
Assessments used (benchmarking, progress monitoring)	
Core curriculum used	
Other supplemental curriculum in study schools (that will and won't be using your product)	
Notes about teacher training	
School contact (name, role, phone, email)	
Meeting day/time	
Meeting notes (add link, if digital)	