RECRUITING PARTICIPANTS FOR CLINICAL STUDIES USING SOCIAL MEDIA: STAKEHOLDER ENGAGEMENT, CASE STUDIES, AND LESSONS LEARNED

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Committee:

- **Andrew Eisman,** J.D., MBA, Senior University Counsel for Health Affairs and Director of Contracts Unit, General Counsel's Office, UF
- **Dianne Farb,** J.D., CHRC, Assistant Director of Research and IRB-01 (Medical) Vice Chair
- **Ira Fischler**, PhD, Chair, UF IRB-02 (Social/Behavioral)
- **Cheryl Granto**, Information Security Manager, Information Security, UF IT
- **Peter Iafrate**, PharmD, Chair, UF IRB-01 (Medical)
- **Michael Mahoney**, Director, Research Operations and Services, Office of the Vice President, UF Office of Research
- **David Wilkens**, Director of Privacy, UF Health Shands Privacy Office

Workgroup:

- **Claire Baralt**, Director of Strategy and Planning, UF CTSI
- **Elizabeth Flood-Grady,** PhD, Postdoc Associate, UF CTSI Recruitment Center and STEM Translational Communication Center, UF College of Journalism & Communications
- **Deaven Hough**, Communications Specialist, UF CTSI
- **Janice L. Krieger**, PhD, Co-Director, CTSI Recruitment Center and Director, STEM Translational Communication Center, UF College of Journalism & Communications
- **Tamara Lowrey,** Communication Specialist, HealthStreet, UF CTSI
- **Meghan Meyer**, Associate Director of Communications, UF CTSI
- **Holly Morris**, Director of Research Services, UF CTSI
- **Tiffany Pineda**, Research Navigator, UF CTSI
- **Lauren Solberg**, JD, MTS, UF CTSI Regulatory Knowledge and Support; Asst Professor and Director, Program in Bioethics, Law and Medical Professionalism, UF College of Medicine
- **Jeff Stevens**, Assistant Director for Web Services, UF Health Communications
- **Lauren Light**, Recruitment Specialist, UF CTSI Recruitment Center

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Presentation overview

- Development of institutional guidelines

- Creation of UF Studies Facebook Page

- Evaluating social media recruitment: Pilot phase

- Lessons learned and opportunities to collaborate

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Background

- Increased interest in using social media for recruitment among investigators at the university
- Limited guidance at the federal level
- Uncertainty regarding social media protocols

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University-wide initiative

In November 2016, CTSI organized institutional stakeholders and subject-matter experts to:

1. Develop institutional guidelines for using social media in research recruitment (most common use case encountered by IRB)

2. Develop a coordinated approach to assess risks, discuss modifications and facilitate decisions on IRB protocols involving complex social media use cases

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Committee and workgroup expertise

- Institutional stakeholders represented on committee:
  - IRB (medical and social/behavioral), general counsel, information security, privacy and research offices
- Subject-matter experts included on workgroup:
  - Communication professionals and researchers, recruitment coordinator, community-engagement specialists, regulatory navigator, bioethics and legal expert

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Timeline

Stakeholder engagement, peer benchmarking, development of UF guidelines and UF Studies Facebook Page

Institutional review and approval, Pilot phase, development of templates/ resources, evaluation and refinement

Rollout

2017

Fall 2017-Fall 2018

Fall 2018-2019

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Thematic content identified through benchmarking peer guidelines

- Compliance with platform terms of use
- Social media as a tool for participant recruitment
- Participant privacy, confidentiality and data security
- Social media as a venue for research

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UF guidelines

Scope:

- Guidelines for research teams using social media to recruit participants

Sections:

- Compliance with Social Media Terms of Use

- Participant Privacy, Confidentiality and Data Security

- Procedures and Considerations for Using Social Media to Recruit Participants, including elements of social media management plans

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UF guidelines:

Elements of social media management plans submitted to IRB
*Elements submitted if UF Studies Facebook page is used (streamlined option)

*Sites to be used
- Official UF or UF Health social media accounts (approval of account manager required)
- If applicable: Public or private groups

*Mockup of materials
- Images
- Text
- Description of placement
- Website materials will link to
- If applicable: targeting criteria for paid ad campaigns

Personnel & Page Management:
- Statement describing adherence to site terms and policies
- Who will monitor, post and respond to comments and inquiries
- Process and language for responding to comments or messages

If applicable:
- Plan for collection, storage and use of any identifiable data to be collected during recruitment
- Privacy, data security, and identity verification for private messaging

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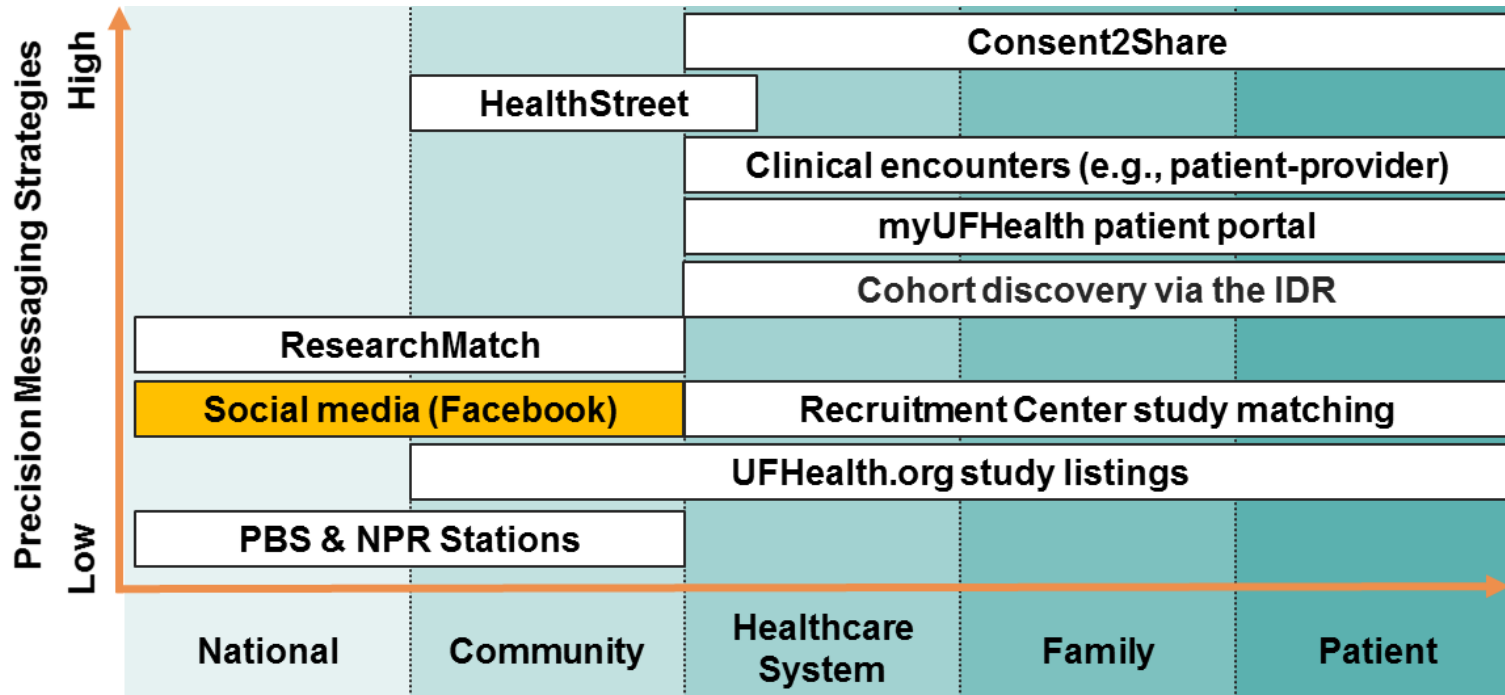**UF** | STEM Translational Communication Center

UF STUDIES FACEBOOK PAGE

- Established in 2016
- Co-directed by Dr. Janice Krieger & Dr. Linda Cottler
- CTSI Recruitment Center Aims:
  - **Optimize recruitment and retention** of study participants
  - **Contribute to the science** of recruitment and retention of research participants

CTSI RECRUITMENT CENTER

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Multi-level communication strategy to support participant recruitment and retention

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- Pre-vetted and approved for use by the IRB, key offices at UF
- Approved by UF and UF Health as an official social media channel
- Managed by CTSI Recruitment Center
  - Offers consults, templates, services
  - Evaluates social media recruitment strategies
- Content Strategy
  - IRB-approved study advertisements
  - Informational posts about research, including dissemination of findings and ways to participate (e.g., ResearchMatch)
  - Shared posts from UF, UF Health, CTSA hubs, NIH and other research-related pages

Goal: increase participation in clinical research and assess effectiveness of Facebook as a recruitment channel

Page View

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UF Studies Facebook Page: Sample Content

Process for Recruiting through UF Studies

After an initial consultation with study team:

Recruitment Center

With Study Team

- Creates mock ups of study ads
- Includes multiple images, text variations for campaign optimization

Provides Study Team

- Social media plan and template language for IRB protocol
- Metrics when ad run is complete

Through UF Studies

- Facilitates purchasing & placement of ads
- Manages ads and comments per IRB approved plan

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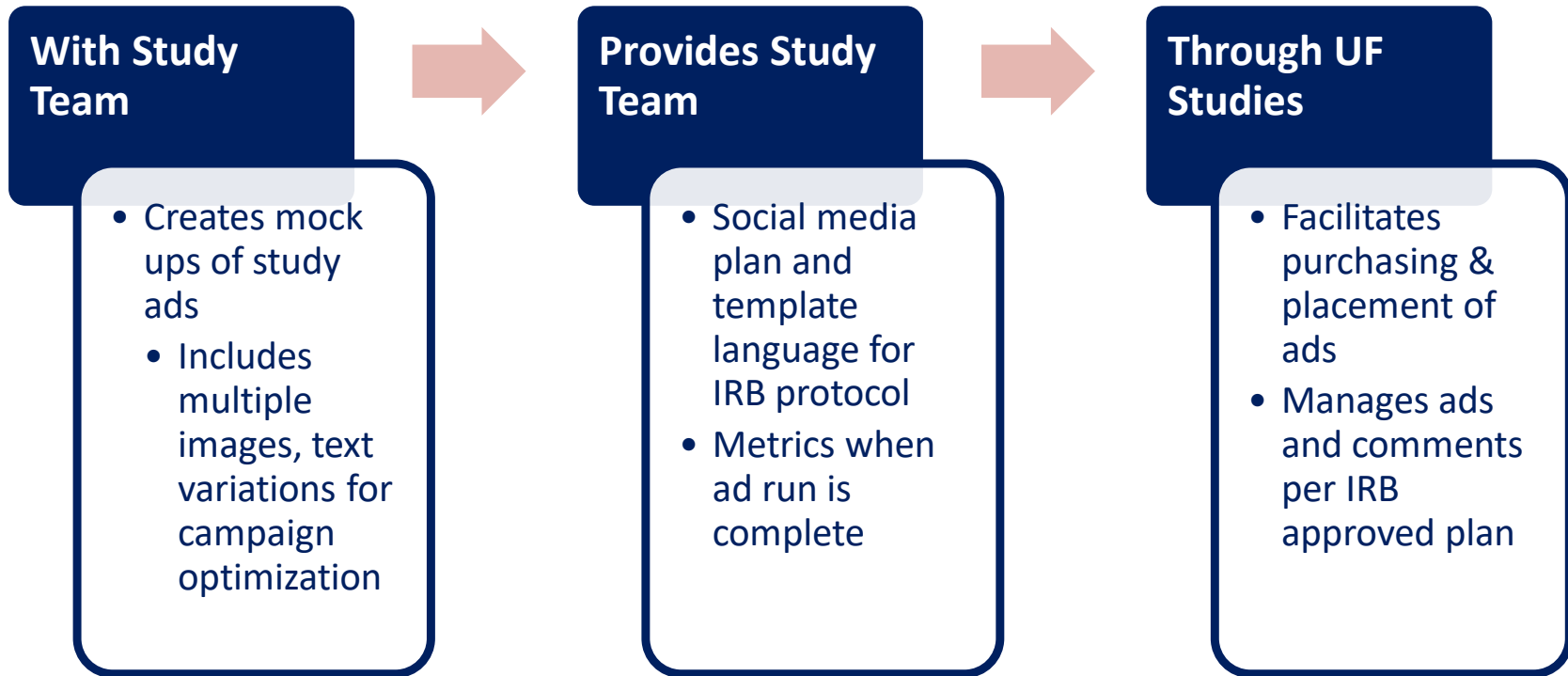
Process for Recruiting through UF Studies

After an initial consultation with Recruitment Center:

Study Team

| Submits or revises existing protocol to IRB for approval and includes UF Studies as a recruitment channel | → | Submits payment for advertisements to CTSI recruitment Center | → | Provides data on study recruitment and enrollment to CTSI Recruitment Center |

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Recruitment Center

Provides Study Team
- Social media plan and template language for IRB protocol

With Study Team
- Creates mock ups of study ads
- Includes multiple images, text variations for campaign optimization

Through UF Studies
- Facilitates purchasing & placement ads
- Manages ads and comments per IRB approved plan

Provides Study Team
- Metrics when ad run is complete

Study Team

Submits or revises existing protocol to IRB for approval and includes UF Studies as a recruitment channel

Submits payment for advertisements to CTSI recruitment Center

Provides data on study recruitment and enrollment to CTSI Recruitment Center

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EVALUATING SOCIAL MEDIA RECRUITMENT: PILOT PHASE

Measuring success

Engagement

- **UF Studies Facebook Page:** followers, likes, shares, comments
- **Posts**: likes, shares, comments associated with posted content, video views

Account utilization

- Number and satisfaction of researchers at UF who use the UF Studies Facebook page as a channel for recruiting participants

Paid campaign tracking using Facebook advertising metrics *(per study*)

- Reach, clicks, impressions, cost (per ad, click, etc.)
- Google Analytics goal tracking on UFHealth.org & UF study pages to determine page views & unique visitors generated from the UF Studies Facebook page

Science of Recruitment

- Message effectiveness (language, photos, etc.)
- Recruitment & enrollment results

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Pilot phase evaluation & case studies

- UF Studies Facebook page: audience engagement metrics, staff time/cost required to manage page
- Pilot campaigns (approved by IRB): advertising and recruitment metrics for 7 study-specific paid ad campaigns, staff time/cost required to manage campaigns

Types of studies recruiting
- Interventional ($n = 3$)
- Observational ($n = 1$)
- Survey/interview ($n = 3$)

Range of target participant demographics
- Parents of toddlers, preschoolers, preteens, teens
- Healthy adult volunteers
- Pregnant women
- Older adults (>65)

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Pilot phase evaluation & case studies

Science of Recruitment:

Identify effective message strategies to increase recruitment and enrollment in clinical research

- *Recruitment message development*
  - Content and visual strategies in study advertisements
    - Linguistic strategies
    - Emotional appeals
- *Recruitment message evaluation*
  - User engagement
  - Recruitment results
  - Enrollment results

Recruitment message

→ Reach, impression, clicks, etc.

→ Recruitment

→ Enrollment

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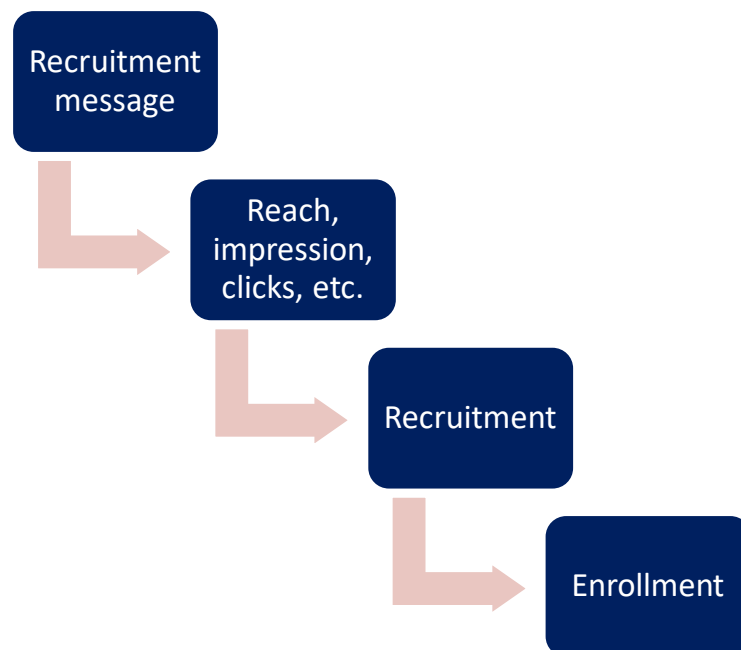
LESSONS LEARNED &
OPPORTUNITIES FOR COLLABORATION

Facebook recruitment

Developing & placing ads
- Facebook offers free images for ads
- Multiple placement options
- Create multiple text variations

Disseminating ads
- Facebook allows you to select times
- Choose times when target audience is likely to see ads
- Run when a staff are available to answer calls

Managing expectations
- Reach for specialized populations may be limited based on search terms or recruiting parameters (e.g. location)

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Institutional guidelines for social media recruitment

1. Benefits to engaging multiple stakeholders
2. Start with targeted focus on social media *recruitment*
3. Benefits to establishing a central channel for hosting study recruitment and templates for research teams
4. Social media *recruitment* "process" is ongoing

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Opportunities to Collaborate

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