## [Sample] Recruitment Guide

**SUBJECT:** [insert]

**PROJECT:**  [insert]

**NAME OF INSTITUTION:** [insert]

**COUNTRY:** [insert]

**TIME FRAME:** [insert]

**TEAM:**  [insert]

1. **INTRODUCTION**

Recruitment is a crucial component of the research process and requires significant effort and precision and can be challenging. Because accurate and insightful analysis depends on the success of these recruitment efforts, we kindly request the help of [insert institution’s name] in recruiting suitable participants. This document provides recommendations to help in the recruitment process.

Women's World Banking recommends that the recruitment begin at least 2 weeks prior to the research. Therefore, we recommend that the recruitment begin on [insert date].

1. **KEY SUCCESS FACTORS FOR RECRUITMENT**

Women's World Banking has found that good recruitment relies on several factors:

* Utilizing clearly defined criteria to select participants;
* Giving participants clear instructions on when and where to go for the research sessions and how long they will last;
* Clearly explaining the purpose of the research with the participants; and
* Informing them in advance that they will receive an incentive for participating (if appropriate).

1. **DATES, TIMES & DURATION OF RESEARCH SESSIONS**

* Research sessions should be scheduled on the agreed dates and times.
* Each research session will last for approximately 1.5 to 2 hours.
* Participants should be asked to arrive 15 minutes prior to the session and must agree to stay for the full duration of the session.
* Please allocate at least 30 minutes between sessions.
* Each focus group should have a minimum of 5 participants and a maximum of 6. Each focus group should be comprised of only participants from one type of criteria. The groups should not be mixed in terms of age and gender.

1. **RESEARCH VENUES**

The research sessions should take place in a quiet, comfortable private room that has tables and chairs (if possible) and is convenient for the participant to travel to. Research sessions should not take place at [insert institution name] branches or offices. Focus groups can take place in a park, community room or another location where participants would feel comfortable. Interviews can take place in the participants’ homes or any of the above locations. They should take place privately without the presence of other family, friends or neighbors. The locations should be within convenient traveling distance for the participants, ideally located in the neighborhoods in which they live.

1. **REIMBURSEMENT FOR TRANSPORTATION EXPENSES**

Participants will be provided with a reimbursement for transportation expenses to come to the research session, or another appropriate incentive per [insert institution’s name]’s norms.

1. **REFRESHMENTS**

To make the participants feel welcome and comfortable, [insert institution name] should arrange for some simple refreshments, such as coffee, juice, biscuits or candy, as appropriate, to be provided during the research sessions.

1. **STEPS FOR RECRUITING PARTICIPANTS**

Please follow the steps below for recruiting participants:

1. The person responsible for recruitment should begin contacting people 2 weeks (if possible) in advance of the research to request their participation in the research and explain the purpose, time and location.

* For focus groups: Because it is common for participants to cancel or not show up at the last minute, at least 10-12 participants should be confirmed for focus groups. We will need a maximum of 8 participants in the focus groups; if additional participants show up, we recommend that the recruiter briefly speak with them for a few minutes and kindly inform them that we have enough participants and that their participation is not necessary.
* For interviews: Because only one participant is to be scheduled for interviews, it is important that the recruiter get a strong confirmation of the availability and willingness to participate.

1. The person responsible for recruitment should carefully keep track of appointments, including the date, time, location, participants’ names and mentor’s names (if applicable) and phone numbers (if available) in an organized document. This document should be provided to [insert institution name] in advance of the research sessions.
2. One day before the assigned research session, the recruiter should call (if possible) to remind participants of the location, day, and time and confirm their participation. In the event that the minimum number of participants do not confirm, the recruiter should contact additional people until they are able to confirm a sufficient number of participants.
3. To maintain the integrity of the data, it is necessary to set up the research in such a way where all possible biases are removed. It is important that participants understand that their participation or lack of participation will not negatively affect the service they get from any institution. Recruiters can encourage participation based on the importance of their opinions and emphasize that the research is a way for them to talk about their unique experience and express their likes and dislikes.