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INTERACT GUIDE

EQUITABLE ENGAGEMENT PRACTICES FOR
RECRUITMENT AND DATA COLLECTION IN
HEALTHY CITY RESEARCH



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Introduction

The environments in which people live, work, and play have a powerful effect on their health and well-being. They shape mobility, social connections, activities, and feelings throughout the day. With over 80% of Canadians living in urban areas, the potential impact of improvements to the urban built environment for health and equity promotion is considerable. Built environment changes like boosting sustainable transportation, greening, and placemaking contribute to building healthier cities: evidence shows they can increase physical activity, promote well-being, and improve social connectedness. Yet, key questions remain: Does everyone benefit from these changes? Are these improvements reaching the communities that need them most?

These questions have become more pressing as cities move to address social and health inequities that persist as a result of exclusionary practices in urban planning. Structurally marginalized communities have historically been discriminated against and excluded from decision-making and planning. These communities include racialized people, Indigenous people, women, gender diverse people, LGBTQ2S+ people, people with disabilities, children and youth, people with low income, religious minorities, older adults, immigrants, and people who speak minority languages. In their work to redress these injustices, city decision-makers are looking for evidence to guide action towards healthier cities for all.

Urban health researchers sit in a unique position to deliver evidence that answers critical questions about who benefits from changes to the built environment and to what extent. Yet researchers must face questions of their own: How can they rethink current practices to better capture experiences of structurally marginalized groups, who are currently underrepresented in research? Our team set out to look for guidance on this topic to deepen our approach of equitable engagement in data collection and recruitment for our 2024 study. Equitable engagement is a process of involving community members in research and planning in ways that prioritize inclusivity and respect for all participants. Equitable engagement seeks to address and dismantle barriers that might prevent certain groups from participating fully and meaningfully in research.

Context

INTERACT is a pan-Canadian collaboration of scientists, city builders, community partners, and residents studying the design of healthy cities. Established in 2017, INTERACT's research program addresses the urgent need for better evidence, generated by and for communities, that can guide local action towards healthier and more equitable cities in Canada. Our study is longitudinal: we have been collecting data on a cohort of participants in Victoria, Vancouver, Saskatoon and Montréal since 2017-2018. Now in the fourth wave, our team spent the Summer and Fall of 2024 collecting data from participants returning from previous waves and recruiting new participants.

Recruiting representative samples of participants is an enduring challenge felt across research disciplines. In INTERACT, we have struggled to 1) recruit large enough samples and, 2) reach structurally marginalized communities, a challenge echoed by city planners when it comes to their own engagement processes. In order to address these gaps in our research, we sought tangible practices and approaches to lower the barriers to participation in our study and increase our recruitment focus on structurally marginalized communities. Specifically, we were looking to correct the underrepresentation of people from lower-income households, racialized groups, and with a lower educational attainment in our cohorts.

To do so, we embarked on a scan of practices to deepen the research team’s approach to equitable engagement for recruitment and data collection. We wanted to learn from researchers across disciplines who struggle with similar challenges, and from other sectors who engage with communities in their everyday work, such as people in advocacy, politics, and community organizations.

The guide provides practical, actionable principles and practices to help researchers lower barriers to participation and improve recruitment efforts among structurally marginalized groups. We have compiled what we have learned in this guide for our own purposes, and we hope it might serve other teams seeking to incorporate meaningful equitable engagement in their approach to recruitment and data collection. We see this guide as a living document and foresee continued additions as our research evolves.

Importantly, there are larger issues that limit representation of structurally marginalized communities in research, and which slow meaningful equitable engagement: institutional biases, lack of research on topics relevant to marginalized communities, funding decisions favouring established researchers and domains, for example. This guide offers steps towards more equity-driven research, yet broader efforts around equity, diversity and inclusion in research are required for systemic change.

Methodology

To prepare this guide, we searched academic literature databases and grey literature (e.g. Google searches). We used keywords related to equitable recruitment, equitable research, recruitment practices, tools, and inclusive research. We also searched in grey literature for examples from sectors outside of public health on successful approaches to engagement (e.g. from community advocates, marketers, pollsters). We conducted our search with specific topics in mind: understanding the study population; working with community champions; delivering messages and calls to participate; guiding participants through the study; and offering incentives. We compiled practices in a shared document and used these practices to craft our recruitment and communications strategies for our 2024 data collection campaign.

In the Fall of 2024, the team came together to structure the practices around broad principles and reorganized insights under three broad areas of action:

1. Starting with purpose
2. Lowering barriers to participation
3. Focusing recruitment on underrepresented communities

For each area, we share the principles and practices uncovered in the literature followed by a description of how we applied these to our 2024 data collection campaigns. The section “Recommendations in action” are specific to INTERACT - we offer them as examples of real-world applications.

01 Starting with purpose

This section highlights principles and practices that relate to the study’s core set-up, namely who will be part of the team, how the team will go about answering the research questions, and how they will allocate resources to different activities. These are elements often defined at the start of the project and have implications for who and how people participate in data collection. Without attention to ensuring these elements are laid out in a way that encourages equitable engagement, teams may struggle to correct mid-way.

Principles	Practices
Form a diverse research team, including community members	<p>Involve people from the communities you are looking to reach as part of the study team. Offer fair compensation for their time and effort. “People will most likely respond favorably to someone similar to them, and this can be someone similar in age, ethnicity, gender, or life experiences.” (1)</p> <p>Implement best practices in equity, diversity and inclusion in research practice and design for team composition and recruiting team members (2,3), such as</p> <ul style="list-style-type: none">○ Use nongendered, inclusive and unbiased language in the job posting○ Advertise positions within organizations representing structurally marginalized groups○ Include interview questions that allow candidates to speak to different ways of knowing, methods and/or experiences.
Offer sufficient training and support to team members	<p>Prepare onboarding package for new team members that includes research objectives, an overview of the current research and current gaps in the study. Include information about inequities that the research is aiming to study. (1) Tailor onboarding approaches for team members who may not be familiar with academic research.</p> <p>Hold regular meetings to identify challenges with recruitment and strategize ways to address them. (1) These meetings can also be a space for staff to report comments, questions and feedback from participants, raise questions, or receive support (e.g. in response to reactions arising from witnessing and responding to negative, degrading, and damaging social media comments on advertisements for the study, especially for people who have a personal connection to the topic or group targeted. (4)</p>

Encourage team members to engage in self-reflection and implement strategies to mitigate the impact of implicit biases (5)	Use reflexive questions to consider one’s position within the research, throughout the research project. “Reflexivity refers to the conscious, active acknowledgement of one's own belief, bias, and judgement systems before, during, and after the actual research process.” (6)
Design research questions and methods to allow for equity analyses	<p>Identify groups / communities that are underrepresented in the current evidence base of your area of research.</p> <p>Consider research methods best suited to collect data on structurally marginalized communities.</p> <p>Develop recruitment methods and analysis strategy with community partners (e.g. should the questionnaire be online, or available as paper copies? Would door-to-door recruitment be more effective than social media?)</p>
Use plain language to clearly convey what the study is about, and what it asks of the participant.	Verify the readability of your survey and “carefully define (...) terms that the general population might not be familiar with or understand”. (7)
Ensure budget to fund non-traditional engagement strategies and ensure fair compensation for participants.	<p>Be realistic about the cost of and time needed for recruitment and include the cost breakdown in the study budget.</p> <p>Set aside substantial budget for recruitment of underrepresented populations.</p>

Recommendations in action

Here, we spotlight some of the above practices we implemented for our 2024 recruitment and data collection campaign.

RECOMMENDATION IN ACTION 1: Recruit community champions to help share details about the study in communities we are looking to engage.

Our small team does not (and cannot) represent all the communities we are looking to reach. To address this, INTERACT recruited community champions to help us connect with people by organizing events, and by sharing study details on their social media. We provided honoraria to people who contributed time and efforts to the study. In Montréal and Vancouver, our team met with key informants from communities we were looking to reach. These people were mainly staff working within community organizations. We asked them about the neighbourhood context, the main transportation and planning issues facing the community, community advocates who could relay the study’s

message, spaces where we might share details about the study, and messaging that compel participants from their community.

RECOMMENDATION IN ACTION 2: Set aside substantial recruitment budget for engagement activities that reach underrepresented populations.

Recruitment of underrepresented communities requires specific efforts, which is why we dedicated over half of the recruitment budget to activities that directly engaged communities currently underrepresented in the research. This included in-person recruitment activities, social media advertising, and compensation for community champions. We avoided social media campaigns that were too general, instead tailoring our messages and visuals to specific audiences.

02 Lowering barriers to participation

Structurally marginalized communities face disproportionate barriers to participation in research and it is the role of researchers to lower those barriers if they hope to engage these communities. Some of the common barriers to participation include:

- Lack of trust or negative attitudes towards research: Negative past experiences or skepticism toward research can hinder participation.
- Time pressures: Participation can be demanding, and time pressures make involvement challenging.
- Privacy concerns: People may hesitate to share personal information due to privacy or data security worries.
- Tech barriers: Limited access to a computer, mobile phone, or ability to connect to Wi-Fi or data can discourage involvement.
- Inadequate incentives: Insufficient rewards or motivation can make participation less appealing.
- Long-term commitment: Committing to a longitudinal study can be a deterrent for some people.

Research studies can anticipate these barriers and implement strategies to ease participation. We highlight principles and practices that relate to the participant’s experience of the study below.

Principles	Practices
Ease the process of signing up and completing the study as much as possible	Offer different ways to participate in the study activities (e.g. online questionnaire vs in person).
	Offer different options for ways for participants to reach out if they have questions (phone number, email, messaging, FAQ).
	Have community members review your study material for relevance, clarity and any terms or phrases that may be perceived as stigmatizing to a certain community. (3)
	Pace the study with incremental commitments. For example, start by asking participants for a small commitment to the research (e.g. a short survey) and incrementally offer participants more options to share their data. (8)
	Ask participants about how they would prefer to be contacted for follow-ups (email, text, etc.).
Communicate study goals and participation clearly and simply	Develop a plain language summary of your research goals and what is being asked from the participant. (3)
	If there is a sensitive question, explain why it is relevant to the study. For example, specify the purpose of the demographic questions. (9)

Offer incentives to participation that are commensurate with efforts needed	<p>Offer financial compensation to participants or another form of compensation adapted to the needs/realities of participants (e.g. lunch, medical consultation, education on the subject under study, etc.). (1)</p> <p>Offer instantaneous incentives following a person’s participation (7). For example: offering virtual giftcards immediately after survey completion, or distributing compensation on site, when participants complete the study activities. Consider non-material incentives, such as visualization of participant data, sharing study results, presenting to partner organizations. For example: offer a guest talk on healthy cities to neighbourhood associations.</p> <p>Increase compensation in accordance with the length of participation or number of activities a participant takes part in.</p> <p>Reward and encourage participants throughout their journey through the study.</p>
Learn about what motivated people to join your study, and build that into future design	<p>Ask a subset of the sample about what made them choose to participate and how they experienced the study. Use these insights to refine design choices to enhance participants’ experiences.</p> <p>Validate the recruitment and data collection tools beforehand with a subset of participants.</p>
Maintain communication with study participants (1)	<p>Regularly share updates about the study with participants</p> <p>Summarize key findings based on participant data back to participants.</p>

Recommendations in action

Here, we spotlight some of the practices we implemented for our 2024 recruitment and data collection campaign.

RECOMMENDED ACTION 3: Present study participation options incrementally

In 2024, we redesigned the participant flow by making the INTERACT survey the main study activity and presenting other activities (the map-based questionnaire, the mobile sensor, the wearable device) as optional. This made the ask simpler for potential participants and allowed to incrementally present additional options to participants. We also automated operations on our participant dashboard which simplified joining other research activities for participants.

RECOMMENDED ACTION 4: Ask a subset of our sample what made them choose to participate and how they experienced the study

In 2022, we asked participants using the study’s mobile app to share their motivations for joining the INTERACT study. We used this data to craft messages for 2024 recruitment campaign. We have asked the same question this round, which will support our following data collection campaign in 2026. We

may also want to ask a subsample of existing participants for insights into how they experience the new participant flow, and whether there were any blockages to their full participation.

RECOMMENDED ACTION 5: Send summary reports about the data to participants after data collection for reciprocity

Our data summaries are available online at www.teaminteract.ca/data. When our fourth wave of data collection will be completed in early 2025, we plan to email short local reports to all participants. They will highlight a few key results, with a link to the full report on our site.

03 Focusing recruitment on underrepresented communities

One of the main ideas in marketing is: "Target everyone, reach no one." The same principle applies to study recruitment. When researchers cast a wide net and target "anyone and everyone", the message becomes too generic and fails to resonate with any specific audience. If we think of a study about transportation as an example: those who are already interested or knowledgeable about the topic—urban planning enthusiasts, transportation advocates—can naturally feel drawn to participating. The message resonates, because it aligns with what they care about. What about people who are less familiar with concepts like urban planning, transportation policy, or healthy design? A broad, general message might not connect with their experiences or priorities, leaving them unengaged.

To move beyond passive, one-size-fits-all strategies, researchers can draw inspiration from communication professionals and adopt more focused and intentional approaches. This means creating outreach efforts that are tailored to structurally marginalized groups, clearly demonstrating how the research aligns with their priorities and values. In this way, the research becomes more relevant and accessible.

This section highlights principles and practices to help research teams prioritize communications and recruitment campaigns that connect with underrepresented communities. To help us think through ways to focus on the underrepresented communities, we used the 5Ws (Who, What, Why, When, Where)

1. **Who** are the communities you are looking to reach?
2. **What** messaging would appeal to these communities?
3. **Why** would these communities be interested in your study?
4. **When** will a potential participant have time to participate in your study?
5. **Where** can you meet these communities?

Principles	Practices
Learn about the study population (age, language, cultural norms, geography, gender and gender identity, etc.)	Learn about the historical context of inequity in your study area. Research current events and main issues relating to your study area and how these affected the communities you are looking to reach. Identify and map community partners or groups that work with the communities you are looking to reach. (10)

<p>Partner with community groups, recognize their contributions and investment in the project (1)</p>	<p>Include community members early in the development and evaluation of recruitment strategies and data collection.</p> <p>Assemble a focus group, advisory group, or partner with an organization to gain insights into the study population. (10,11) Forge long-term (1) partnerships with community groups, based on equitable, non-hierarchical relationships (10): “These organizations have already gained the trust of the community, and; building on that trust is invaluable”. (1)</p> <p>Establish a communications strategies to connect with partner organizations. (1) Be clear and realistic about what the community partner would get from a partnership, to make sure the partnership is reciprocal. Offer honoraria to community partners who help you connect with communities. Some non-monetary compensation could include training for their staff, technical assistance, new software and extra research staff as student interns. (3)</p>
<p>Identify recruitment goals for different groups to make clear where efforts are needed, and where resources will be spent</p>	<p>Identify recruitment goals for different communities based on your study’s objectives. These goals could be based on socio-demographic characteristics, area, or a combination.</p> <p>Create tools that allow to track progress on your recruitment goals, such as dashboards accessible to the team.</p> <p>Hold regular meetings to assess success of strategies and adapt.</p>
<p>Identify the appeal of participating for different communities, and use these to adapt messages for different audiences</p>	<p>Tailor recruitment messages to different groups, based on the appeal of participation.</p> <p>Avoid words that could have a negative connotation in another language, by having community members reviewing your material.</p>
<p>Come up with clear and relevant messages that pique your audience’s interest and curiosity</p>	<p>Tap into people’s personal connection to the study topic. Research that addresses a personal or family problem encourages involvement. (12)</p> <p>Be clear in study communications about what is expected of participants. (13)</p> <p>Have lay community members review translations. (5)</p> <p>Draw inspiration from marketing techniques (14):</p> <ul style="list-style-type: none"> ○ Communicate temporal proximity: now, urgent, soon, last chance, immediate ○ Communicate physical proximity: refer to a community, a neighbourhood ○ Convey trustworthiness, that you’re open and receptive to divergent views

- Invite input upfront: People pay much more attention when they know their input or perspective will be requested or invited at the end
- Use inclusive language to make people feel they are part of a team
- Emphasize uncertainty to get people to want more information or to think about something
- Reference change (e.g. health guidelines on x have recently changed)
- Use messages with « you »
- Ask questions

Include a call to action: Conclude with a call “motivating your audience to take the next step. The smaller the step, the more likely your audience will comply. Set up your audience for an effective closing. It should be clear what your audience should do, by when, and how.” (8)

Use visuals and graphic design in service of your message	<p>Use cohesive visuals that represent realities of the communities you are hoping to reach.</p> <p>Ensure your material is compatible with the platform you plan on using (resolution, format, size). (1)</p>
Join community events where potential participants already gather	<p>Look for and attend community events to meet participants where they are.</p> <p>Collect contact information from potentially interested participants and follow up with study details.</p> <p>Use QR codes on print material to easily have people find you online.</p>
Seek out online channels geared towards your target population (1)	<p>Share research details on community platforms and forums: Explore local platforms, forums, and online communities related to your area or topic. These can be ways to share information about the study with specific communities, tailored to their interests.</p> <p>Identify influential people who can relay your message</p> <p>Follow online conversations: Use social listening tools like Hootsuite or Mention to monitor online conversations related to your area, topic or communities. This can help you frame messaging to connect your study to relevant topics, and timely issues of interest to the communities you are looking to reach.</p>

Recommendations in action

Here, we spotlight some of the practices we implemented for our 2024 recruitment and data collection campaign.

RECOMMENDATION IN ACTION 6: Identify specific appeal of participating for different communities

Through insights obtained through key informant interviews and our own local research (see recommendation in action 1), we prepared communications plans for each study site, mapping the appeal of the study for the different communities we were looking to reach. The communications plan informed all our recruitment material, from social media campaigns to in-person events.

RECOMMENDATION IN ACTION 7: Create community-specific and neighbourhood-specific campaigns with visuals and copy adapted for audience

We called out the specific neighbourhoods and populations groups in recruitment material. We did this by using photos of important neighbourhood sites (e.g. Punjabi Market) and naming neighbourhoods in our messaging. We also included a call on our website inviting participation from communities underrepresented in research.

RECOMMENDATION IN ACTION 8: Organize drop-in sessions in community spaces where participants complete survey on site

We hosted in-person recruitment days in a neighbourhood organization (e.g. community org, community centre, library) that groups frequent where people can drop in, complete the survey on site with an iPad or computer and enjoy free food and childcare while they complete it. In Montréal, we hosted a discussion around transportation issues at a community organization, where we offered food and childcare. As part of the session, people had a chance to complete the survey as a group and were able to ask questions directly to the research team.

RECOMMENDATION IN ACTION 9: Create a dashboard to track in real-time the composition of the cohort, and track recruitment goals.

We monitored a live dashboard with metrics on our sample's composition and met bi-weekly to discuss results and adjustments needed. Staff working on recruitment shared effective practices on a shared slack channel dedicated to the topic.

Conclusion

We prepared this guide to highlight practical ways our team could deepen our efforts toward this goal. We propose three broad areas of action that work in tandem: 1) starting with purpose for equitable engagement; 2) lowering barriers with more inclusive research practices; 3) and increasing representation of structurally marginalized groups in research. Attention to all three of these areas is needed to make effective inroads towards more equitable research. The principles and practices we compiled require significant time, resources, and intentionality to implement, which are rarely reflected in research budgets. Investments in outreach, translation services, culturally specific engagement strategies, and adequate compensation for participation are essential but often overlooked by teams putting together budgets. Without these resources, even the best-intentioned efforts risk falling short of their goals.

As attention to equity has increased, some researchers have chosen to focus exclusively on structurally marginalized groups rather than strive for population-representative samples. The idea is to center structurally marginalized communities to address a glaring gap in the research landscape and capture the lived realities of those most affected by health inequities, which can lead to evidence that can directly inform policies to reduce disparities. Others maintain that identifying inequities requires comparison groups to document which groups need attention. While a greater focus on equity-deserving groups does not mean the end of representative samples, it does bring to the fore open questions about how to best invest limited resources.

While this guide offers tangible steps toward more equitable engagement, it also underscores the need for continued reflection and adaptation. We look forward to working with partners, learning from our limitations, and contributing to the collective effort to build healthier, more inclusive cities for all.

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