

## Participant Management to Maximize Implementation and Scaling

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**Description:** Research studies of all sizes rely on participation from many stakeholders – community leaders, educators, and many levels of school system administrators. The current educational climate is a challenging one in which to conduct research; teachers are spread thin with demands from myriad directions, researchers struggle to find the best ways to break through the noise and spread the word about their studies, and the general precarious nature of grant funding can limit trust between researchers and potential study subjects. With these issues piling on to the already-demanding work of implementing a high-quality study with fidelity, many researchers are at a loss for how to support continued enrollment in high-quality research, much less scale promising or successful interventions at the conclusion of a study.

Partnering with educational stakeholders to conduct research hinges on building relationships, communicating effectively, and thinking creatively. Within these core principles are highleverage strategies that build on ideas established in key bodies of research (IES, 2023) and are only likely to increase in importance as schools and districts address myriad needs through overlapping, competing initiatives, and with limited time. Despite these challenges, educational research still seeks to be rigorous and far-reaching. To meet this need in these times, researchers must be thorough when investigating where to work, resolute with continued outreach, and flexible and consistent when managing participants.

Presenters offer a conception of recruitment as an ongoing process, with three discrete phases: recruitment, onboarding, and participant management. Recruitment often refers simply to finding participants for one study, but to be successful, it is critical to broaden this definition to emphasize “building a bench” of possible participants across studies. Recruitment can be more successful when it is framed as a research-practice partnership (e.g., Whitaker et al, 2020). Subsequently, onboarding, or introducing participants to a study, often takes many different forms. Onboarding may need to happen more than once, especially as teacher turnover is likely to affect a study sample (NCES, 2024), and it may also need to be in a few different forms with a variety of resources to ensure participants know what a study entails. Finally, participant management is a piece of studies that researchers often underestimate in terms of time and effort. It is important to have staff roles to manage participant well-being, helpful structures (e.g., calendars, resources, recurring emails), establish ways to troubleshoot common issues, and identify junctures where it may or may not make sense to provide flexibility. Structuring recruitment, onboarding, and participant management in this manner can produce higher recruitment and higher-than-average retention and lead to creative and meaningful approaches to scaling work. Thoughtful, well-tracked interactions can help study participants feel cared

for, lead to lasting relationships and future partnership, and prove deeply beneficial to the quality of research.