



Recruiting & Retaining Participants for Your Education Research

The National Science Foundation's DRK-12 projects explore innovative approaches to enhance teaching and learning in preK-12 classrooms. Each year, many teachers are recruited to participate in DRK-12 research. However, despite a heightened focus on conducting education research that responds to district and teacher needs, recruiting and retaining teachers has become increasingly challenging due to the COVID-19 pandemic's impact on education systems. DRK-12 awardees persistently seek and refine strategies to engage school districts and teachers in their studies. To address these challenges, CADRE interviewed seasoned researchers to gather insights into their successful approaches, drawing on their extensive experience in both formal and informal educational settings and across various project types, sizes, and locations.

Teacher recruitment and retention do not follow a one-size-fits-all approach, particularly when comparing urban and rural systems or small design and development studies to large randomized control trials (RCTs). Yet, there are tested strategies that provide valuable guidance. Keys to success are thorough preparation, effective communication, and, crucially, building relationships. Recruitment is a significant and time-consuming component of research projects, requiring careful planning in terms of timeline, staffing, and budget.

TIP: Researchers report that often districts and teachers farther from universities may be less saturated with requests and more willing to engage. However, those districts may not have research infrastructure and experience and, therefore, may require more support (e.g., with data sharing agreements).

Building Partnerships

Successful recruitment is viewed as a long-term endeavor by the researchers we interviewed. They and their institutions often have developed and maintained longstanding relationships with districts, administrators, and teachers, fostered through years of collaboration and engagement outside of specific research projects, such as by conducting conferences, professional development programs, and other outreach activities. These interactions help build networks and trust, which are pivotal in creating recruitment opportunities.

TIP: You might attend local education conferences, listen to the interests and needs of the teachers, and then design responsive professional development, aligning with district priorities and initiatives where appropriate. In this way, you can start to establish a relationship with the teachers prior to working on a study together—a step in developing a relationship in which both sides benefit.

TIP: Newsletters can help an institution, research department, or project share STEM education information and opportunities, and further develop a reputation as a trusted resource. Of course, you are not limited to your own newsletters. Researchers often list project-related opportunities in district, state, and regional education agency newsletters.

Keep connected to your teacher network during the summer through newsletters with fun, useful, and informative content. You can also use the newsletters to preview the activities for the year to come.

Early engagement with districts (before writing a proposal, securing funding, or starting recruitment) can be beneficial, allowing you and your research team to understand district and teacher needs and priorities and design or adjust research proposals accordingly. This early interaction can foster a sense of investment and ownership among district members, develop trust in the researchers, and enhance support for the research program. Ultimately, if you want your work to impact the practice community, it must address the problems with which they grapple.

TIP: The DRK-12 solicitation includes a partnership development project type.

Understand the value proposition of your ask (i.e., what the district and teachers might gain in relation to what you're asking of them). For instance, you might visit state websites and explore their data dashboards for achievement test scores. If scores have gone down or there is an area in which students consistently fail to meet expectations, you may be able to advocate for your project as a solution to potentially raise achievement.

Leveraging Contacts and Networks

Personal contacts and networks are invaluable in recruitment efforts.

In rural districts, where there may be skepticism toward outsiders, or in urban districts, which are often inundated with research proposals, having a well-connected advocate is crucial.

Use existing networks, including professional contacts and past participants, to enhance recruitment effectiveness. More specifically, skim through public employee lists to identify potential contacts your team knows or recruit from your institution's outreach participants, especially if you are familiar with who may be more appropriate for your research. You can reach out to your experienced colleagues for connections to their networks. District contacts and leaders can be an important liaison between you, administrators, and teachers. You might engage leaders as project advisors, formally or informally, to build a relationship. They may help you navigate the politics of the district (who are the influencers and decision makers, whom to contact first, etc.). They may be able to inform you that researchers may have no contact with teachers until the project has been accepted by the administration (in these situations, recruitment may be more challenging), that the district prefers researchers to work through the local and/or regional education association, or that you may work directly with the principal and teachers at charter schools even though you would ordinarily need superintendent approval when working with multiple schools.

For larger studies or surveys, these personal contacts can help promote the study “on the ground,” enhancing visibility and participation beyond what you may gain from a mass mailing or social media post. For a study that requires teachers to engage in ongoing work, asking your contact for nominations may lead to more success since the leaders in your network will be familiar with your work and with which teachers may be most interested in, appropriate for, able to commit to, and likely to benefit from your study.

TIP: While mass online recruitment may be needed for large studies, be aware that bots are an ever-increasing challenge—especially if you are offering an incentive to those who sign up for the study—requiring you to check IP addresses or the time stamp of completed surveys to be sure that they were completed by a human.

A contact may help introduce you to the administration and get you “in the door” for a meeting; however, even when your first meetings are with the district decision-makers (e.g., superintendent, assistant superintendent, principal), try and meet with an influential intermediary closer to the workings of the classroom (e.g., instructional coaches and teachers) to ensure that your project is a good match for those who will be engaged in the work. Of course, developing a 1:1 relationship with each teacher in preparation for and throughout a study may be the most robust and reliable approach to recruitment and retention, but this isn’t always possible, especially for large-scale projects.

Meeting with teachers as a group may allow you to answer questions, address nay-sayers’ concerns, and amplify the enthusiasm of the cheerleaders. If there isn’t a fit, consider recommending something else to meet their needs (e.g., another study). Be aware that if you aren’t aligned with the district priorities and the teachers’ needs, your project may be the first to go, especially if there are administration changes! By the way, if you are maintaining a long-term relationship with a district, try to develop a relationship with new administrators as soon as they take their position. This may help you when it comes time to contact them about a project.

Keep in mind that if you or members of your research team have a previous relationship, whether personal or professional, this can affect the voluntary nature of participation. Someone may feel obligated to a researcher given the relationship. This does not mean you can’t attempt to recruit people you know; but you do need to emphasize the voluntary nature of participation and that their participation or lack thereof will not impact the relationship. Be particularly careful, for instance, about recruiting students in your teacher education programs.

Messaging

Messaging should clearly convey the research’s benefits and requirements to help well-aligned potential partners and participants self-identify.

Personalizing communication and using various media, such as videos or interactive Web platforms, as well as informal methods, can improve engagement. Perhaps you can pay teachers (especially teacher leaders) who have completed a previous professional development experience with you to offer an informational session on Zoom or a free workshop about the work, or they can share information more informally with individual or small groups of teachers.

If possible, prepare a secure website where you post information about the project, forms, etc. (e.g., FERPA, memorandum of understanding [MOU], 1-page description of the project).

TIP: If you are starting a project such as an RCT with a lot of student data, you'll need to have an MOU signed by someone in authority to do so (e.g., the superintendent). You may also want an MOU to share with teachers to be explicit about and accountable for what the researchers and the teachers are expected to do during the study.

It's good disciplinary practice for you and/or other project leadership to prepare these materials because it helps you think through all the aspects of the project. If the site is established on a platform familiar to teachers, it can also be used for ongoing project needs (e.g., collecting data and sharing resources for PD). But again, be sure the website is straightforward for teachers to access and use.

TIP: Try using a form to plan, gather key information, and communicate that information to the district during initial contact. View a [sample form](#).

When you're a bit further along and ready to explain the project in more detail with teachers, consider providing information in writing and then reviewing the key information during a webinar or in-person meeting. View a [sample manual](#).

When the district is ready to enter an agreement, hold an introductory session with participating teachers. If possible, do this in person to develop relationships and enthusiasm, using webinars only when an in-person gathering is not feasible. Talk through issues such as research consent, Institutional Review Board (IRB) requirements, and photo release forms. Anticipate their questions and be ready to answer concerns (e.g., data privacy, how the project relates to district priorities, how the project may make teaching and learning in their classrooms more interesting and, perhaps, successful).

Motivations and Incentives

Understanding what motivates districts and teachers to participate is crucial. Don't underestimate the importance of helping districts and teachers meet their learning goals. In addition, tailoring incentives to meet the specific needs and interests of the teachers and districts involved can significantly enhance participation rates.

Incentives can vary widely but often include financial compensation, professional development opportunities, and access to added resources. Determine what will incentivize the district and your recruits. Are there union rules related to incentives? Are the teachers restricted from receiving payment when they are on duty and therefore you can only pay for their time when they aren't officially on duty? An administration may be more supportive of an effort to engage teachers after school hours or in the summer when the district doesn't have to arrange and pay for substitute teachers.

The most common incentive for teachers is monetary. Stipend amounts vary, so be clear about how you're determining the payment amount (e.g., matching the amount the district pays per hour for engagement in professional development activities or providing an equivalent flat rate, or keeping payments under the amount that would require the teachers to pay taxes on the stipends).

Projects may also offer monetary incentives beyond the stipend for participation (e.g., a gift card when teachers submit forms by a deadline). Whatever the amount or type of financial incentive, make sure that teachers can receive their payments easily and on time, and be sure not to overemphasize the amount or you might engage in undue influence.

TIP: There are companies that can help with bulk gift card dispensing and processing.

As an alternative, some projects offer a raffle instead of individual gift cards to those who, for instance, submit certain forms or materials by a deadline. The total cost to the project may be equal to providing a gift card to each teacher but the single prize value may be much larger than a single gift card.

Always check to make sure your approach to incentives is allowable by your funder and acceptable to your IRB.

But money isn't the only incentive for the district or teachers. A district may appreciate knowing that its teachers will receive professional development in an area of district priority, that it will receive reports about how the study may improve student learning, or that its manipulatives will be replenished.

A teacher's time is valuable, there are a lot of demands on it, and they may be balancing other options and negotiating incentives. Consider that what may most excite them is learning how to better engage their students and promote their learning. Will the research directly impact the students in a positive manner, or will the research enable teachers to do something that they've wanted to do or accomplish in their classrooms? If participating in the study will help teachers with their practice, you have a built-in incentive.

Other motivational options in addition to financial incentives (e.g., offering professional development, useful resources, meeting snacks, or contact hours) may also make your project stand out. If your project involves the use of training or classroom materials, build into your budget the cost of leaving those materials with teachers after the project ends for continued use. A teacher may want general classroom supply funds.

TIP: Be aware of your context. In a rural setting, a class may only have a few students. In that case, it may not be wise to have a large portion of your budget tied to classroom materials. and acceptable to your IRB.

Participation options, such as joining a professional learning community or going on project-related field trips, may help teachers connect with other teachers while engaging in activities that provide variety to their normal routines. Teachers may benefit from contributing to or co-authoring an article or attending a conference. Consider partnering with teachers on a presentation and supporting their travel and attendance expenses. You may choose an application process for attending a conference if there is more demand than funds can cover. If there isn't an appropriate conference, consider organizing one! This provides an opportunity for key network members to nominate speakers from within or beyond the network. Finally, of course, there is chocolate! Providing food when appropriate and possible is one way to show you value the teachers' time and

effort. In addition to providing incentives up front, consider when during the project teachers might benefit most from an incentive. Beyond the welcome package, you may want incentives throughout the teachers' participation or at key milestones, such as when they've completed forms.

Build motivation by acknowledging teachers' expertise and effort. During the study, share information about the progress you're making and the ways in which participants are contributing to something larger. You can do this, in part, through a short newsletter that includes information on the project logistics, one or two to-dos, and data. You can also include teaching tips and resources. You might highlight resources you've posted in an online repository of lesson plans related to the research study, perhaps including teacher adaptations, to support teachers' practice. Try to include a shout-out section in the newsletter in which you elevate what teachers in the project are doing in the classroom and include artifacts. From spring break to the end of the year, teachers are quite busy and may really appreciate your acknowledgment.

Finally, though it may seem obvious, be sure you stick to what you said you'd do.

Since you'll need to submit your recruitment plan and materials to your institutional review board (IRB), you might also check with your IRB officer and grants office to plan incentives. They have seen how other projects have approached incentives and know what is appropriate and allowable vs. coercive and excessive. Be clear about what can be included as participant support vs. other direct costs.

Attrition and Retention

Planning for attrition is essential, as engagement levels can fluctuate throughout a project. Flexibility in participation requirements and maintaining open and effective communication can mitigate potential drop-offs in participation. Researchers should strive to make participation as seamless and integrated into teachers' regular activities as possible, reducing barriers and addressing any logistical challenges.

TIP: Consider NSF program officers as a resource for troubleshooting attrition issues and include your plan for attrition when you write your proposal.

It can take more than a year before proposal submission to work through the beginning steps of recruitment. Then there is the time between the initial agreement with a district, school, or teachers and the time of funding. That leaves a lot of time for circumstances and best intentions to change. Even though you may have a letter of commitment from a district, it isn't binding. A district may pull out for several reasons (including a change in administration). You also may have letters of agreement or even commitment from teachers who ultimately change their minds about engaging in the project, change classrooms, or leave the school.

Some researchers start recruitment in the spring, offering an incentive if the teachers honor their agreement and sign the consent in the fall. Inevitably there is some attrition by the fall, necessitating an additional round of recruitment. Therefore, plan to recruit 10–20% more teachers than needed and figure out who you can recruit to cover any additional attrition. Know how many additional teachers, classrooms, and schools that meet your recruitment criteria are in the district(s) with which you have an agreement.

To help avoid attrition, be clear about your criteria for study participants, including who may be most appropriate for the study. For instance, teachers in their beginning years of teaching are often consumed by learning how to teach and may not have the bandwidth to focus on professional development that doesn't address immediate classroom management needs. Consider whether you want teachers who have different or even conflicting schedules (e.g., East Coast versus West Coast), motivations, and experience.

Even if you've done all you can to start the project with good recruitment practices and have the teachers you need for the study, life circumstances may make it difficult for some teachers to continue. In these situations, flexibility can benefit you well. For example, can you reduce the amount of time the teachers spend on the project? Can they bring a child who needs childcare? Can they miss a project meeting or two? Can they attend virtually instead of in person? Can some sessions be optional?

TIP: If you have the time and means, consider running a mini-pilot to learn how to make the study most relevant and painless for the teachers.

Make it as easy as possible for teachers to participate and especially to collect and share data. Consider keeping all the information that teachers need in one easily accessible website in addition to emailing and speaking to teachers about what they need to know and providing any forms they need to complete (along with self-addressed, stamped envelopes, if needed). Whatever means you use to convey information, be sure that the language is accessible. Is English their first language? If not, try and translate the materials. Make sure your materials are culturally competent and sensitive.

For larger projects across multiple schools or districts, it may help retention if each teacher is participating with one or more colleagues from their own school. They may be in the position to support each other logistically (e.g., carpooling) or otherwise (e.g., coming from the same school culture and having a sense of what may work best in their context).

Also consider what might limit or disincentivize participation at all levels (e.g., with district leaders or teachers, to engage in the project). For example, when are you proposing to hold professional development sessions? Districts may not have funds for substitutes or an adequate pool of potential substitutes, requiring teachers to remain in their classrooms. If it's a funding issue alone, you may be able to provide funds to cover substitutes. But if there aren't enough substitutes to cover the district needs, additional funds may not resolve the issue.

Find out when teachers prefer to meet. Do they prefer after school, on weekends, or during the summer or school breaks? They may be too exhausted at the beginning of summer and away or working mid-summer. It could be that teachers prefer to meet the weeks immediately preceding school's opening in the fall. You may think that you can avoid some headaches by offering only summer institutes, but then you won't have interactions with the teachers when they're implementing the teaching practices, curriculum, or tools with students. Try to find a solution that meets the district, teacher, and research needs.

Conclusion

Effective teacher recruitment relies on building relationships early, committing to reciprocal engagement, and integrating the needs and interests of practice partners into the research design. While there are no shortcuts to successful recruitment, a sustained commitment to understanding and addressing the needs of a district and its teachers is key to long-term success.

Related Resources

- 2024 Proposal & Award Policies & Procedures Guide (PAPPG) (NSF 24-1, participant support section) <https://new.nsf.gov/policies/pappg/24-1/ch-2-proposal-preparation#ch2D2fv>
- Forum Guide to Education Data Privacy (National Forum on Education Statistics): <https://nces.ed.gov/pubs2016/nfes2016096.pdf>
- Memorandum of Understanding Template (Office of Elementary and Secondary Education): <https://oese.ed.gov/files/2023/07/Memorandum-of-Understanding-Template.pdf>
- Model Data Use Agreements: A Practical Guide: <https://admindatahandbook.mit.edu/book/v1.0-rc3/dua.html>
- Participant Support Costs Self-Assessment Checklist (NSF): https://www.nsf.gov/bfa/dias/resources/Participant_Support_Costs_Self-Assessment_Tool_Interactive.pdf
- Participant Support Guidelines in Cost Analysis and Audit Resolution Branch (CAAR) Targeted Review Area – Participant Support (NSF 1-pager): https://www.nsf.gov/bfa/dias/caar/docs/factsheet_participant.pdf
- Recruiting Research Participants (Teachers College Institutional Review Board): https://www.tc.columbia.edu/media/administration/institutional-review-board-/guide-amp-resources---documents/Participant-Recruitment-for-Research_TCIRB_2021-1.pdf
- Recruitment Letter Template (Teachers College Institutional Review Board): <https://docs.google.com/document/d/1GMt5xMr5ORgUm0SB4gRO0lyDBNb3ejzF2tjK-uj9Glo/edit>



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**Community for Advancing
Discovery Research in Education**

CADRE is a network for STEM education researchers funded by the National Science Foundation's Discovery Research PreK-12 (DRK-12) program. Through in-person meetings, a website, common interest groups, newsletters, and more, CADRE connects these researchers who are endeavoring to improve education in science, technology, engineering, and mathematics in, and outside of, our schools.

CADRE helps DRK-12 researchers share their methods, findings, results, and products inside the research and development community and with the greater public so that we are:

- **Better informed** about the work that is being done,
- **Continually building** on what we have collectively learned,
- **Working with our schools, communities, and policy-makers** to make our findings and products accessible and usable, and
- **Progressively able to address new and more challenging issues**—including those issues that extend beyond the limits of what any singular research project can impact.

**Together, we can make a larger impact
on policy, research, and education.**

Contact cadre@edc.org for more information.

