NSW Digital Service Toolkit - Activities and templates

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|  | Research Recruitment Brief  Create a recruitment brief for finding and screening research participants. |

## Document snapshot

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| **Use for**: Ensuring you recruit the right participants for your research | | | | | | |
| **When**: You've decided what you're trying to learn through research | | | | | | |
| **With**: User research lead | | | | | | |
|  | Time  **30 mins +** |  | Casting **1+ team members** |  | Tools **Word** |
|  | The time depends on whether you have already considered your possible user groups |  | Creating your recruitment brief is a 1-person job but it’s a good idea for the user researcher (if that’s not you) or someone else in the team to review it. |  | This template is in Word, you can transfer this to another tool if you’d prefer. |

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## Document guide

Recruiting participants is an important part of research and ensures you aren’t relying on your own team or existing networks (who might not give you reliable findings).

You will likely need to recruit specific types of people, or people with specific experiences, so you can understand the impact of your problem or solution.

Having diversity across the group of people you research with is also important in helping avoid biases.

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| **What’s it for** | **What you’ll get** | **When to do it** |
| Developing clear documentation of the participants you want to recruit for your research session. | A simple recruitment brief template you can adapt and re-use for all research participant recruitment. | Before you start recruiting participants for your research sessions. |

## How it works

### Before you start

* Plan your research approach and method, including establishing the objective of your research sessions.
* Identify ethical considerations, whether your research may cover sensitive topics or is including vulnerable people.
* Consider how you will ensure you are being inclusive in your research approach.
* Set an indicative time for your interview sessions (Generally between 30 and 90 minutes).
* Decide how many sessions you will run. This will decide how many participants you need to recruit.

**Step 1***:* Describe the Purpose, and Topic for your research sessions.

**Step 2***:* Identify the Participant criteria.

Refer back to your defined topic and ask who will most likely use these services?

Some example criteria you should consider:

* **Tool experience (i.e. using similar websites)**
* **Past experience with this specific service/website/process (or an earlier version)**
* **Knowledge or experience of the subject matter / area**
* **Diversity**

Write your ‘Broad participant criteria’ as a heading, and the total number of participants.

Consider using a table to indicate the breakdown of each specific criteria within your participants group. For example, if you have 6 participants total you may want 3 who are parents and 3 who are not parents.

Note: For some government services which provide support to certain parts of the community you may need to be even more targeted in your recruitment. Include this in your brief to ensure you research with the right people. If this is the case make sure your brief notes any specific demographics and any special conditions participants must meet.

**Step 3***:* Decide if you will be recruiting yourself or using a recruitment firm.

If you’re using an external agency to recruitadd contact details for the team member who is keeping track of the sessions booked.

**Step 4:** Write your exclusions

State who you’re NOT looking to research with.

For example, if you’re testing a service or product with concepts employees are familiar with (but other people generally are not) then you might want to exclude recruiting current employees.

**Step 5***:* Describe the Format and Schedule for your research sessions.

**Next steps**

If you're working with a recruiter, set up a call to talk them through the brief and answer any questions. It helps to collaborate with recruiters to generate a screening script / questionnaire to help them make sure they are getting the right people.

If recruiting with your team, set up a briefing session to answer any curly questions.

## Additional resources

Example recruitment brief (Word)

## ▐ Recruitment brief template

|  |  |
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| **Overview** |  |
| Purpose | Setting out the criteria and any specifics of your research will help find the right people to take part in your research. |

**Purpose**

**[Context and purpose of the research]**

### Topic

* **[What general topics will be covered]**

### Format

* **[Number of participants]**
* **[Session format (e.g. 1:1 interview, card sorting, focus group etc.)]**
* **[Session length]**
* **[Whether the session will be recorded]**

**Face-to-face option**

* **[Interview location and any access instructions (e.g. report to reception)]**
* **[Accessibility information]**

**Remote option**

* **[Video link details (e.g. link will be emailed one hour prior to session)]**
* **[Phone call details (e.g. you will receive a call to your nominated phone number]**
* **[Alternative access option details]**

**Tip:** Some participants may not have access to a device, reliable internet, or phone credit. Considering access and inclusion by providing several, proactive remote options will help include more participants.

**Participant requirements:**

**[List requirements for the participant joining the session]**

* **[e.g. must be in a quiet room with no background noise and focused exclusively on the interview]**
* **[e.g. access to the internet on a computer or laptop (no tablet)]**

### Incentives

* Face to face attendance : **$X**
* Remote attendance: **$X**
* **[Insert information on how the payment will be made, e.g. EFT, cash, gift card)]**

### Recruitment method

**[Optional – e.g. if recruiting in house record how you’ve sourced participants. If using a supplier, list which one.]**

### Contact

Please confirm sessions via email to **[email address]**

### Schedule

Research field dates (X interviews per day):

* **[Date]**
* **[Date]**

### Daily slots

1. **[List time slots your recruiter can book participants for.]**

**Expert tip:** Leave at least 30 minutes between session to allow for debriefing, note taking and a short break.

### Participant criteria

**[List the specific criteria for participants being recruited.]**

**[Replace as required]**

* **Tool experience:** [list any criteria around familiarity with how to use the website, application, and/or product/service]
* **Program experience:** [list any criteria around familiarity with programs and/or services that surround what you’re researching]
* **Domain experience:** [list any criteria around existing content knowledge]
* **Diversity:** [list any criteria which will ensure your participant reflect the diversity in the overall population or users of your service]

### Topic: [Describe the topic of your research]

Broad participant criteria: [Describe an overall category of participants]

Total participants: **[how many people]**

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| **Specific criteria:**  **[indicate which specific criteria you’re setting requirements for. List the breakdown of each area and how many participants within that group].** | **Number of participants needed** |
| [e.g. Goes to restaurants weekly] | [# people] |
| [e.g. Goes to restaurants fortnightly] | [# people] |
| [e.g. Goes to restaurants monthly] | [# people] |
| [e.g. Goes to restaurants less than monthly] | [# people] |

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| **Demographic criteria:**  **[indicate any criteria you’re setting demographic criteria for e.g. Location]** | **Number of participants needed** |
| **Metro** | **[# people]** |
| **Regional NSW** | **[# people]** |
| **Rural/remote NSW** | **[# people]** |

### Diversity of participants

When recruiting please ensure there is diversity across the participant group that reflects the wider community, including:

**[Replace or update as required]**

* Gender diversity
* Age
* Different cultural/language background
* Aboriginal/Torres Strait Islander
* Only speak English at home
* Speak a language other than English at home (e.g. Indian, Chinese, Arabic, Vietnamese…)
* A range of levels of income (desirable)
* A range of different household structures (e.g. single parents, dual parents, one child, several children)

### Exclusions

* **[List any exclusion criteria as required]**



Document end.