



Research to Practice Brief

By Daniel Friend and Diane Paulsell

OPRE report #2020-78

Developing Strong Recruitment Practices for Healthy Marriage and Relationship Education (HMRE) Programs Serving Adults

For more information about the Strengthening Relationship Education and Marriage Services (STREAMS) evaluation, visit the project's web page at <https://www.mathematica-mpr.com/our-publications-and-findings/projects/streams>.



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Although research shows participants in HMRE programs enjoy participating and find them worthwhile (for example, Baumgartner and Paulsell, 2019), programs for adult couples and individuals often face challenges recruiting participants and reaching enrollment targets (Exhibit 1). Programs conducting evaluations that require random assignment and data collection can face additional challenges (for example, increasing recruitment to account for random assignment of some applicants to a comparison group). Recruitment challenges are not unique to HMRE programs. Other psychosocial and health interventions have faced similar issues, particularly when the interventions involve rigorous research (for example, Bower et al. 2009; Levkoff and Sanchez 2003). The field of family research has also documented challenges in recruiting parents and their children to participate in prevention programs or research (Hogue et al. 1999).

The Administration for Children and Families (ACF), Office of Planning, Research, and Evaluation (OPRE) launched the Strengthening Relationship Education and Marriage Services (STREAMS) project to identify and test strategies for improving the delivery and effectiveness of HMRE programs. STREAMS is a multi-site,

random assignment evaluation of a subset of HMRE programs funded by grants from ACF's Office of Family Assistance (OFA).

The STREAMS technical assistance (TA) team has worked closely with OFA grantees participating in the evaluation to help them recruit sufficient numbers of program applicants and enroll them in the study, drawing on findings from prior research. In particular, the team examined implementation study findings on participant recruitment from three federal evaluations of HMRE programs (Exhibit 2)—Building Strong Families (Dion et al. 2010), Supporting Healthy Marriage (Gaubert et al. 2010, 2012), and Parents and Children Together (Zaverri and Baumgartner 2016).

Based on these findings and the experiences of OFA grantees participating in the STREAMS evaluation, this brief describes five steps for building recruitment capacity in HMRE programs serving adults. These steps are applicable to a variety of HMRE programs serving adults to help design and implement recruitment strategies. The steps presented below are mainly related to program recruitment, but we also discuss considerations for recruiting participants for HMRE program evaluations.

Exhibit 1. Common recruitment challenges

- **Finding and engaging hard-to-reach populations.** HMRE programs often target low-income, hard-to-reach populations such as racial and ethnic minority groups or families living in poverty. Many researchers have faced challenges recruiting and enrolling these populations (Lambert and Wiebel 1990; Shaghaghi et al. 2011). Generally, this difficulty has been attributed to mistrust of researchers or practitioners, cultural beliefs, fear of authority, and concerns regarding exploitation or mistreatment (Bonevski et al. 2014).
- **Engaging and enrolling both members of a couple.** HMRE programs serving couples need to recruit both partners, but are often in contact with only one of them during initial recruitment. In many programs, contact begins with the female partner in heterosexual couples and recruiting the male partner can be challenging.
- **Addressing misconceptions about HMRE programming.** Common misconceptions include a belief that HMRE programming is couples therapy or that participants will have to disclose personal matters. In many instances, the misunderstandings are related to other challenges, such as cultural beliefs about help-seeking behavior.
- **Creating and maintaining recruitment partnerships.** Many HMRE programs develop community partnerships to generate referrals. These often wane over time due to staff turnover, shifting priorities, or other reasons. New HMRE programs sometimes struggle with establishing partnerships because the programs lack name recognition in the community.
- **Hiring and retaining recruitment staff.** HMRE programs can have trouble hiring and retaining recruiters and sometimes do not hire recruiters with the right mix of skills for all the recruitment activities.

Exhibit 2. Recruitment strategies described in implementation research on HMRE programs

Recruitment strategy	Findings from prior research
Identifying the target population	<ul style="list-style-type: none">• Conduct activities to clearly define who the program is serving• Use characteristics of the target population to inform recruiter hiring, recruitment partnerships, and specific recruitment strategies
Hiring recruiters	<ul style="list-style-type: none">• Use full-time recruiters who have characteristics or backgrounds similar to the target population or have experience working with the target population• Consider placing more value on the recruiter's ability to connect with potential participants than on formal education• Use a mix of male and female recruiters to engage with both genders
Conducting recruitment activities	<ul style="list-style-type: none">• Prioritize direct interaction with participants over passive recruitment such as advertising• During direct interactions, focus on building relationships with potential participants and address any misgivings and misconceptions about participation• Use referrals from other organizations and other forms of advertising in combination with direct interactions
Developing partnerships	<ul style="list-style-type: none">• Partner with other well-known community organizations to improve name recognition and program legitimacy• Consider establishing formal contracts or agreements to solidify partnerships• Maintain regular contact, provide updates, cross refer, and help partners with their programs and events
Monitoring recruitment	<ul style="list-style-type: none">• Create and regularly revise recruitment plans that include recruitment goals or enrollment targets and document expected recruitment activities for a specified period• Gather data to monitor the success of each activity

Sources: Dion et al. 2010; Gaubert et al. 2012; Zaveri and Baumgartner 2016.

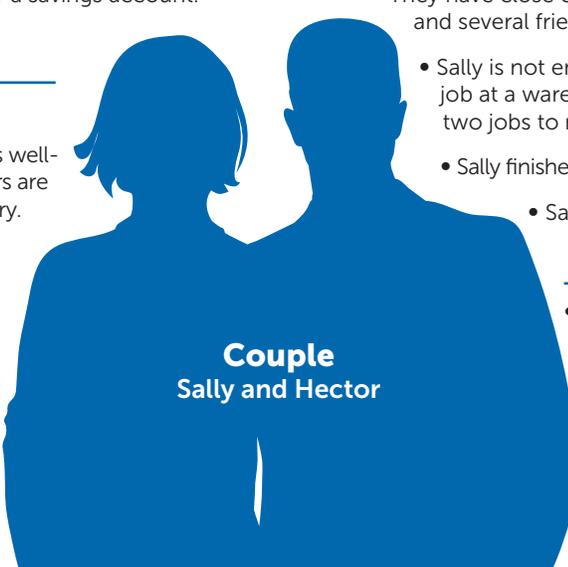
STEP 1. DEFINE YOUR TARGET POPULATION

Start by developing a thorough definition of your target population. Implementation research emphasizes the importance of clearly defining a target population and aligning program activities, including participant recruitment, with the population’s specific needs and characteristics (Metz and Louison 2018). For example, a well-defined target population can help programs identify locations to recruit potential participants and community partners serving the same population. To accomplish this, program staff should think through: (1) specific inclusion and exclusion criteria; and (2) other characteristics that might contribute to potential applicants’ motivation or ability to take up services. For example, a couple might meet program eligibility criteria but have unstable housing or work schedules that may interfere with their ability to participate. A program may be able to provide case management or referrals to address the housing problem and facilitate the couple’s participation. On the other hand, if work and program schedules do not align, the couple might not be a good candidate for enrollment as they will have difficulty participating in program activities. Programs can use a range of data sources to better understand the target population. For example, programs could use data from a similar program implemented at their organization, conversations with community members, and other data on their community (such as Census data).

Create a participant profile that describes their potential journey through the program. After staff have thought through the characteristics of the target population, creating a profile of a typical participant may help staff develop recruitment strategies (Crosier and Handford 2012; Lemon and Verhoef 2016; Rosenbaum et al. 2017). This profile documents the circumstances of the participant and their likely interactions with program staff. The profile should include the participant’s circumstances before program enrollment. Examining the pre-enrollment period can help programs better understand: (1) where to find potential participants and other providers that serve them; (2) barriers to enrollment; and (3) potential misconceptions and apprehensions about the program. Understanding the barriers and the potential misgivings about participation can help recruiters engage with potential participants and address their concerns. Exhibit 3 shows an example profile from a STREAMS grantee, the Parenting Center.

Exhibit 3. Example participant profile developed by the Parenting Center

Hopes		Current status	
<ul style="list-style-type: none"> • Better life for kids. • Quality family time. • Better job. • Stable housing. 	<ul style="list-style-type: none"> • Wants to feel heard by their spouse and children. • Quality date time. • More funds for a savings account. 	<ul style="list-style-type: none"> • They have three kids (ages 2, 4, and 5). The school they will send them to is low-performing. • They live in a suburb where they can find affordable housing. • They have close connections with immediate family, and several friends within the community 	<ul style="list-style-type: none"> • Sally is not employed. Hector works a full-time job at a warehouse and, seasonally, he works two jobs to make ends meet. • Sally finished high school and Hector has a GED. • Sally is 30 and Hector is 32.
Barriers		Roots	
<ul style="list-style-type: none"> • Expensive childcare. • Cultural/language barrier. • Sally would like an office job, but needs additional education. • Sally has some chronic pain issues. • Hector has outstanding speeding tickets. • Both have low credit scores. 	<ul style="list-style-type: none"> • No savings. • Their one car is well-used and repairs are a constant worry. • Hector works long hours in unstable low-wage jobs. • Afraid to trust counseling services and share their personal business. 	<ul style="list-style-type: none"> • Sally grew up occasionally attending a church. • Both grew up in households that lived paycheck-to-paycheck. • Sally grew up in an abusive home with two parents. Hector grew up with his mother and two siblings. 	



Couple
Sally and Hector

If relevant, programs should consider developing separate profiles for subpopulations. For example, an HMRE program might recruit several subpopulations, such as married couples, engaged couples, dating couples, couples raising children, and expectant couples. Each of these subpopulations may have unique wants, hopes, needs, and barriers that recruiters may need to address.

STEP 2. FORM THE RECRUITMENT TEAM

Hire dedicated recruiters with the right background and skill set.

Programs should consider hiring staff to focus on recruiting full time. Recruiting is challenging and often demands considerable attention and the ability to be flexible and shift priorities. In prior evaluations, programs that employed dedicated recruitment staff were better able to respond to challenges and prioritize last-minute recruitment activities. For example, if a program uses facilitators or clinicians to recruit, they might have to juggle an HMRE workshop schedule with their recruitment duties. This could lead to missed opportunities to recruit participants.

When hiring recruiters, programs should seek candidates who have characteristics or backgrounds similar to the target population or experience working with the target population. Research shows that using recruiters who resemble or come from the same community as the target population can alleviate mistrust, fear, and misconceptions about participation (Bonevski et al. 2014). Moreover, the skills needed to be an effective recruiter differ from those many social service organizations typically seek for other positions. When hiring recruiters, programs should prioritize recruiters' ability to connect with the target population over formal education and professional work experience. Programs might even hire former participants to serve as recruiters due to their familiarity with the program and connections to the community. Finally, some programs participating in the prior federal evaluations and STREAMS hired mixed-gender teams to help them engage both men and women during recruitment.

Carefully craft recruitment messages to help recruiters connect with potential participants. Programs might consider working with recruiters to develop specific recruitment messages. This could involve creating short messages (or elevator pitches; Exhibit 4) and statements designed to address reasons for not participating and encourage participants to sign-up for an HMRE program (Exhibit 5). To construct the most effective messages, recruiters have to know the needs of the target population and their likely perceptions about the program, as well as how the program operates and the benefits of participating. To facilitate this, some programs train recruiters in the curriculum or have them observe the HMRE workshops. Elevator pitches should aim to describe the program in positive terms, for example as a date night, and include the main benefits of participating. It might also be worthwhile to mention participation supports, such as meals or child care.

Many potential participants will quickly say “no thanks” without fully hearing the recruiter’s pitch. To increase recruitment success, recruiters should be ready with responses to typical reasons people give for saying no to these kinds of programs (Exhibit 5). Recruiters should create several variations of their recruitment message tailored to the types of people they might encounter. For example, implementation studies of HMRE programs reported that recruitment staff tailored their messages for men and women. In addition, the STREAMS TA team encouraged recruiters to deliver these messages in a warm, friendly manner to increase rapport. Recruiters should also ensure their recruitment messages build a relationship between the recruiter and the potential participant. For example, recruiters should ask questions of potential participants and actively listen to them. This enables recruiters to get to know participants and craft responses that truly speak to their lived experience.

Exhibit 4. Example elevator pitch

This is a free program geared to help you improve your relationship and keep it strong by teaching you new ways to communicate and deepen your connection to each other. It will help you work together as parents and talk about the tough issues that everyone faces when raising kids. The program also provides opportunities for fun activities with your children and child care during the classes. All of this is to help create and keep a loving home life built on a strong, healthy relationship.

Exhibit 5. Tips for getting from “no” to “yes” with potential participants

- **“We don’t have time.”** You’ll hear this one a lot. People are busy. There are a couple of ways to overcome this. The first step is to acknowledge their busy lives. Don’t invalidate their perception of their time. One approach might be to talk about the benefits again and tell a story about a couple who were pressed for time, but made time to participate and how it changed their lives. Tell the potential participants you understand their sacrifice and discuss how the benefits of the program are worth it. Another approach might be to ask them what makes them so busy. Maybe it is a lack of resources (such as transportation) that you can help them address. Also, tell them about your program schedule and how you have a variety of options to meet their needs. Finally, they might actually not have time to participate in your program, or their lives might be too chaotic at the moment. Ask for their contact information and say you will try them again in a few months when things calm down.
- **“We’re not interested.”** To address this response, you have to ask potential participants more questions. Why aren’t they interested? What would make them interested? They might have a misconception about the program or misunderstand part of it. Asking these questions enables you to address the issues. Also, knowing what would encourage people to participate helps you think about how to improve your program or your pitch. Maybe there is already a benefit that meets their need. If so, you could tell them about this benefit or adjust your pitch to introduce it earlier.
- **“We don’t need therapy.”** People often have misperceptions about group-based services. They think it is therapy and participants must talk about feelings. Men often raise this concern. Again, acknowledge their concern. Remind them that this is not therapy. In fact, the funding can’t actually pay for therapy! Tell them what the group is actually like, the typical characteristics of others in the group, and that they will be asked to share only as much as they are comfortable expressing. Talk to them about the benefits of the group format: they might make friends and find support; they may find out they are not alone in the challenges faced by their family. Describe what they might learn. This might also be a good time to tell stories about the workshop or give them a preview of some exciting aspect that shows them how different from therapy the workshop will be. Talk to them about others who have had similar feelings and have done well.
- **In programs with research studies: “We’re uncomfortable about participating in research.”** This is tough to get around, but it is doable. Remind the participants that you need the best evidence to continue to have funding for this great program, and that involves this research. Therefore, you and their community need them! By participating in research, they can help you offer this program to more people and continue funding. They are vital to the success of the program. Leverage their sense of community and how much you need them. Also, remind them that their data will be kept strictly private; no names or identifying information will ever be released or associated with answers. Their personal information will not be shared.

STEP 3. DECIDE ON A MIX OF RECRUITMENT STRATEGIES

HMRE programs can use several types of recruitment strategies:

1. **Direct recruitment.** In this type of activity, recruiters engage directly with potential participants. Examples include attending local school district events, health fairs, community events, and setting up information tables at local destinations (such as shopping centers) to speak directly to potential participants.
2. **Referrals.** Third parties, such as staff at other programs that serve the target population, can deliver recruitment messages on behalf of the HMRE program to potential participants. To establish a referral network, programs have to create formal and informal partnerships with local community centers or multiservice organizations serving the target population, and health systems (we discuss this more in the next step). Encouraging word-of-mouth referrals from current and former participants can also be fruitful.
3. **Indirect recruitment (advertising).** This type of activity involves creating and distributing recruitment materials (such as flyers or advertisements) for potential participants to encounter and review in the community. This could include using print (newspapers, flyers, and billboards), electronic (radio and TV), and social media (Facebook, Craigslist, Instagram, and Twitter). Many programs in STREAMS and the other federal evaluations have found that this type of passive recruitment strategy does not yield many new recruits compared to the other two approaches. The TA team has encouraged programs to use images and language that are relevant to the target population. For example, the team has worked with program staff to design marketing materials at a general reading-level and avoid using more academic or practitioner-focused language.

The STREAMS TA team has worked with programs to create recruitment activities that include all three types of strategies, while emphasizing direct recruitment. Implementation studies of HMRE programs have found that direct recruitment typically yields more participants than the other approaches. During one-on-one direct recruitment interactions, recruiters can build relationships with potential participants, address their misgivings and misconceptions about enrolling in the HMRE program, and sometimes enroll participants on the spot. Referrals can also boost recruitment efforts. Programs with a successful referral pipeline have many formal and informal contributing partners. Indirect recruitment often has the lowest yield. Although many programs in the prior federal evaluations used a combination of print, electronic, and social media advertising, staff at most programs reported that these efforts alone were not sufficient to enroll the needed number of participants. Although marketing efforts often increase community awareness and name recognition, personal contact with a recruiter might still be necessary to successfully recruit participants. More recently, several grantees in STREAMS have created successful, targeted social media campaigns— a method that was not as easily accessible to grantees in prior evaluations. These STREAMS grantees have tailored their social media ads to their respective target populations and have seen increases in enrollments.

STEP 4. DEVELOP AND MAINTAIN RECRUITMENT PARTNERSHIPS

Generate more referrals by identifying and prioritizing an extensive list of potential partners. Partners often have established locations and services that HMRE programs can tap into for recruitment. Identifying the right partners starts with a well-defined target population. This allows grantees to scan their communities and create a comprehensive list of organizations that may be serving their target population and might be able to refer potential participants to the HMRE program. This activity can take several forms, including leveraging professional and social networks and performing basic internet searches.

After developing a comprehensive list, the next step is to prioritize the potential partners. The STREAMS TA team has encouraged programs to conduct internet research on potential partners, such as examining their missions, the services or programs they offer, and available reports or statistics on the annual number and characteristics of people they serve. The TA team has also helped STREAMS grantees track this process by creating a partner development worksheet to standardize the information they examine.

After programs complete the research, they can better prioritize partners with similar missions that serve large numbers of people in the target population (Exhibit 6).

Exhibit 6. Considerations for prioritizing partners

Programs should consider focusing on partners with which they can use all three types of recruitment strategies. Recruiters might attend events hosted by the partner organizations and consider co-hosting events with them to conduct direct recruitment. In addition, recruiters can train the partner staff to discuss the program with potential participants and provide them with the materials needed (such as enrollment or consent-to-contact forms) to enroll in the program. Recruitment staff can also consider placing flyers at partners' sites and work with them to use their partners' social media accounts, newsletters, and emails to promote the program.

Formalize strategies for developing and sustaining partnerships to get the most from these relationships. The STREAMS TA team has encouraged recruitment staff to begin developing partnerships by scheduling in-person meetings with leaders, managers, or administrators at potential partner organizations. To prepare for these meetings, recruiters created specific recruitment messages geared toward partners' leadership and frontline staff. In addition, recruitment staff should review their research on the partner so they can demonstrate their knowledge of the organization during the meeting. For example, recruitment staff might note how the organizations' missions align or

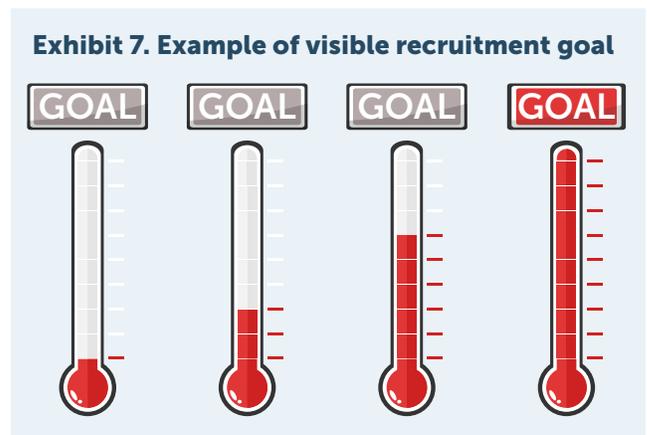
how they can cross-refer to a specific program. This approach can help staff create a relationship with the organization and its staff and foster a sense of reciprocity needed to meet both organizations' goals. The TA team has also encouraged recruitment staff to clearly indicate what they seek in a partner (for example, 10 referrals per month).

To maintain partnerships, the STREAMS TA team has helped programs create systems to ensure follow-up, set regular check-ins, and formalize the partnerships. After an in-person meeting, recruiters should follow up within one business day to clarify next steps (such as speaking with other frontline staff, conducting direct outreach, and so on). Moreover, the STREAMS TA team has encouraged program staff to be a consistent presence in the minds of the partner staff. This could take many forms, including sending emails to partners to document the number of referrals received within a given month, holding biweekly in-person meetings about the partnership, and ensuring partners receive the HMRE program's newsletters and other communications. The STREAMS TA team has also helped programs to formalize their partnerships by setting targets for cross-referrals from both partners or creating memoranda of understanding to record specific agreements and expectations of both parties.

STEP 5. TRACK PROGRESS AND CELEBRATE SUCCESS

Establish a process for tracking and monitoring recruitment activities and enrollments to help recruiters assess how well their strategies work and make adjustments when needed. Many programs involved in STREAMS also created recruitment plans, which they revised as often as monthly. The STREAMS TA team encouraged programs to include a mix of activities in the plan, with the bulk of the recruiters' time focused on direct recruitment. To identify direct recruitment opportunities to include in the plan, recruiters should talk with their partners and professional networks and conduct internet searches of events in the community. The plan should include new and existing referral partnerships and plans for indirect recruitment (such as sample social media posts). In addition, these plans typically include each recruiter's monthly goals or benchmarks, which are usually organized into weekly or daily goals (for example, 40 couples a month at 10 per week). This focus on specific goals helps staff assess the value of potential activities, manage time, and monitor progress. Programs should collect data on their recruitment activities to gauge the success of each activity.

Create a culture of innovation and celebrate success to help motivate recruiters. The STREAMS TA team has encouraged programs to develop a positive learning environment that promotes creative recruitment ideas even if the ideas might not produce the desired enrollments. This approach encourages "outside-the-box" thinking and enables program staff to critically evaluate their recruitment strategies using program data and continuously improve upon them. Similarly, programs should celebrate the successes of the recruitment team. For example, programs can post visible recruitment goals and mark the progress toward these goals regularly (Exhibit 7). When recruiters reach their goals, it's time to celebrate their success. This can be simple (such as employee recognition in a staff meeting) or more complex (such as buying lunch for program staff). Research suggests that employee recognition and celebrating success can promote job satisfaction and innovation (Brick 2012; Race and Furnham 2014).



NEXT STEPS

This brief documents recruitment strategies used by programs participating in the STREAMS evaluation, and the evidence-informed recruitment guidance provided by the STREAMS TA team to address common recruitment challenges.

The STREAMS evaluation is ongoing. Future process and impact study reports will provide rich information that programs can use to improve the delivery and effectiveness of HMRE programming. In particular, the process study findings will help document recruitment challenges, solutions, and best practices of HMRE program serving adults. Programs can then use these findings to further refine recruitment and enrollment strategies in the HMRE field.

ABOUT STREAMS AND THE GRANTEES

In 2015, the Office of Planning, Research, and Evaluation launched an evaluation of selected HMRE grantees. The STREAMS project is a multisite, random assignment evaluation of a subset of HMRE grantees funded by OFA. STREAMS examines four HMRE grantees that serve adults to identify strategies for improving the delivery and effectiveness of HMRE programs (Exhibit 8). A fifth grantee is also part of STREAMS, but is a school-based site serving youth and is out of scope for this brief.

Exhibit 8. Description of HMRE grantees serving adults in STREAMS

Family and Workforce Centers of America (FWCA)	<i>Program name</i>	Career STREAMS
	<i>Location</i>	St. Louis, Missouri
	<i>Target population</i>	Young adults
	<i>HMRE curriculum</i>	Within My Reach integrated with FWCA-created employment curriculum
The Parenting Center	<i>Program name</i>	Empowering Families
	<i>Location</i>	Fort Worth, Texas
	<i>Target population</i>	Adult couples
	<i>HMRE curriculum</i>	Family Wellness integrated with financial planning and employment content
University of Denver	<i>Program name</i>	Motherwise
	<i>Location</i>	Denver, Colorado
	<i>Target population</i>	Pregnant women and mothers of newborns
	<i>HMRE curriculum</i>	Within My Reach
University of Florida	<i>Program name</i>	Smart Couples
	<i>Location</i>	Alachua, Citrus, Duval, Manatee, Palm Beach, and Santa Rosa counties in Florida
	<i>Target population</i>	Adult couples
	<i>HMRE curriculum</i>	Elevate and Smart Steps

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