

ENGAGING WITH PRIMARY SCHOOLS

for public health research:
a practical toolkit for researchers



IMPERIAL

Co-produced by **Dr Bina Ram**
and the **School Stakeholder Group**

ENGAGING WITH PRIMARY SCHOOLS for public health research: a practical toolkit for researchers

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ENGAGING WITH PRIMARY SCHOOLS FOR PUBLIC HEALTH RESEARCH: A PRACTICAL TOOLKIT FOR RESEARCHERS

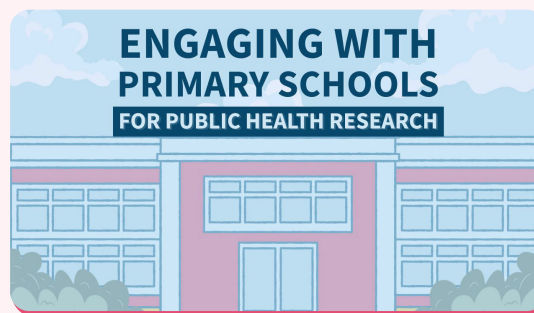
This toolkit has been co-produced by Dr Bina Ram and a School Stakeholder Group comprising 17 primary school teachers. It provides guidance for researchers to facilitate schools' involvement with child health research by expanding researchers' knowledge and skills to engage with schools throughout the study research period, and to respectfully conduct data collection.

The development of this toolkit has combined researcher experience, and experiences of teachers taking part in research studies. It specifically focuses on working with primary schools. Some suggestions may be transferable to research within secondary schools, but there are distinct factors, considerations, and challenges that may require tailored approaches beyond the scope of this resource. Suggestions and tips for engaging with schools should be used for guidance only and may require adaptations depending on the type of research being conducted.

The narrative assumes that all ethical approvals for the research to be conducted are in place, and that consent and/or assent has been obtained from schools.

All researchers working with schools and interacting with pupils should have a Disclosure Barring Service (DBS) Certificate in place.

A video of teachers, parents, and children sharing their views on being recruited into and involved in research is available to view [here](#) - click to watch.



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ABOUT THE AUTHOR



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With over 25 years of working in research, Bina has extensive experience in mixed-methodology and large-scale evaluations of policies and interventions, particularly whole-school interventions. She has primarily worked with schools, families and children from ethnically and culturally diverse backgrounds, underserved communities, and those living in poverty. Her current research focuses on child and adolescent mental health. She has a particular interest in child health inequalities, with a focus on intervention and prevention approaches throughout childhood to improve lifelong wellbeing.

FOREWORD

Why engage with schools for public health research?

Studying health and behaviour at scale is essential for improving population health. Childhood is a particularly important time, as healthy behaviours can be established and carried into later life.¹ It is also a key opportunity to address health inequalities. Children living in poverty, those from some ethnic groups, and those with special educational needs and disabilities are more likely to experience poorer health outcomes than their peers.² These early differences can shape longer-term health and wellbeing.³

In England, education is compulsory for children aged 5 to 16, and most attend school full-time.⁴ This makes schools one of the most effective settings for reaching large and diverse groups of children.⁵

Engaging schools early in the research process helps build strong, positive relationships. Research should be done *with* schools, not *on* them. A collaborative approach, where both researchers and schools benefit, works best. This means involving key stakeholders from the start, such as senior leadership teams, parents, governors, and school staff.⁶ Their input can improve the relevance, reach, and impact of research.

Working in partnership with schools is essential for developing and delivering interventions in real-world settings. When done well, it can generate meaningful evidence to inform policy and practice, and ultimately improve child health outcomes.

Why should schools engage in research?

Engaging in research can support schools to strengthen teaching practices and enhance professional development. This aligns with the Education Inspection Framework (EIF), which is used by Ofsted (the UK's Office for Standards in Education, Children's Services and Skills) to evaluate schools.⁷ Participation in research also creates opportunities to enrich pupil learning and support staff development beyond the academic, technical, or vocational curriculum.⁷ It can contribute to a broader educational experience, helping schools to deliver more holistic learning in line with curriculum aims.

Why is guidance for engaging with schools for research needed?

Recruiting schools to take part in research is widely recognised as challenging. Researchers often face barriers such as identifying and contacting appropriate schools, securing participation, managing low response rates, and maintaining communication within limited time and resources.

Schools and parents may also encounter challenges. These can include a lack of clear information about the purpose of the research, its relevance, and its potential benefits for pupils, staff, or the wider school community. There may also be understandable concerns about the additional workload that participation could involve.

Addressing these challenges requires early and meaningful engagement with schools, ideally before any data collection begins. Building relationships from the outset helps to establish trust, clarify expectations, and improve the likelihood of participation.

Effective engagement is an ongoing process rather than a one-off activity. It should begin during the planning and design stages, well before recruitment, and continue through to sharing findings. Providing results in accessible and practical formats is key to ensuring value for schools.

While the challenges of recruiting schools are well documented from a research perspective, less is known about what supports effective engagement in practice. In particular, there is limited insight into teachers' perspectives on why they choose to take part, or not, in research.

What does this toolkit offer?

This toolkit is designed to help researchers navigate common challenges when working with schools. It brings together insights from researchers' experiences alongside the perspectives of teachers who have been invited to take part in research. It highlights what supports teachers' engagement, the factors that may discourage participation, and practical ways to manage expectations throughout, and beyond, the research process. It also includes an accompanying video featuring teachers' and parents' perspectives on being approached to participate in research.

Overall, it aims to strengthen researchers' understanding and provide practical, actionable guidance on engaging and recruiting schools, while building and sustaining positive, collaborative relationships.

What would researchers gain from using this?

This toolkit supports researchers to strengthen the quality and impact of their work in real-world settings. The behavioural epidemiology framework⁸ highlights the importance of translating research into practice, including in settings such as schools, healthcare, and communities. Generating evidence in these contexts is essential for developing interventions that are both feasible and meaningful, helping to bridge the gap between research and practice.

By using this toolkit, researchers can improve how they engage and communicate with schools, supporting more positive experiences for teachers and staff involved in research. Clear, consistent, and respectful engagement increases the likelihood of successful recruitment and sustained participation. Positive experiences also matter beyond a single study. Schools that feel valued and supported are more likely to take part in future research and recommend involvement to others, helping to build stronger, longer-term partnerships and expand research reach.

INTRODUCTION

Engaging schools in research should be approached as a reciprocal partnership. Building positive relationships is key to generating interest and encouraging participation. Where possible, these relationships should begin early, before a study is fully developed, by involving schools in shaping ideas and co-developing research questions.

Opportunities for engagement and recruitment can include interactive activities, such as school assemblies or sessions within Personal, Social, Health and Economic (PSHE) education. When early co-development is not feasible, these approaches can help introduce the research, raise awareness, and support recruitment among pupils and staff.

Insights from focus groups with 17 teachers in London, who co-produced this toolkit, identified three key factors that influence whether schools choose to participate in child health research:

1. Meaningful contribution to research

- Schools value opportunities to contribute to research that can inform policy and practice.
- Early involvement helps teachers better understand and respond to related processes (e.g. requests linked to Education, Health and Care Plans).
- Supporting pupils to understand their role in research, and its wider impact, can increase engagement.

2. Using research to promote healthy behaviours

- Research findings can help teachers better understand health issues and tailor support for pupils.
- Insights from studies can strengthen how schools communicate health messages to pupils and families.
- Feedback allows schools to identify gaps and take targeted action to improve outcomes.

3. Clear and useful feedback

- Findings are most valuable when contextualised (e.g. through comparisons with other schools or national data).
- Schools benefit from clear insights into areas like physical activity, wellbeing, and diet.
- Presenting results in accessible, user-friendly formats supports use by staff and families.
- Signposting to relevant resources and support helps schools take practical action.

Section 1

Engaging with schools

ENGAGEMENT THROUGHOUT RESEARCH

Engagement should be embedded throughout the research process, rather than limited to the beginning or end of a study (see Appendix 1). Effective public involvement and engagement (PI&E) ensures that schools are included as active partners at every stage of research.

PI&E activities at the early stages of project development should focus on collaboration and shared decision-making. Working with teachers, parents, and pupils helps ensure that the research design is appropriate, that information is accessible, and that school priorities and perceived benefits are embedded within the study.

Co-production with schools supports stronger study design and increases the relevance of findings for the target population.

Ongoing engagement throughout the study should focus on sharing knowledge and sustaining relationships. This can include activities that provide direct

educational value for pupils and families, while also strengthening trust and collaboration between schools and researchers.

Key consideration

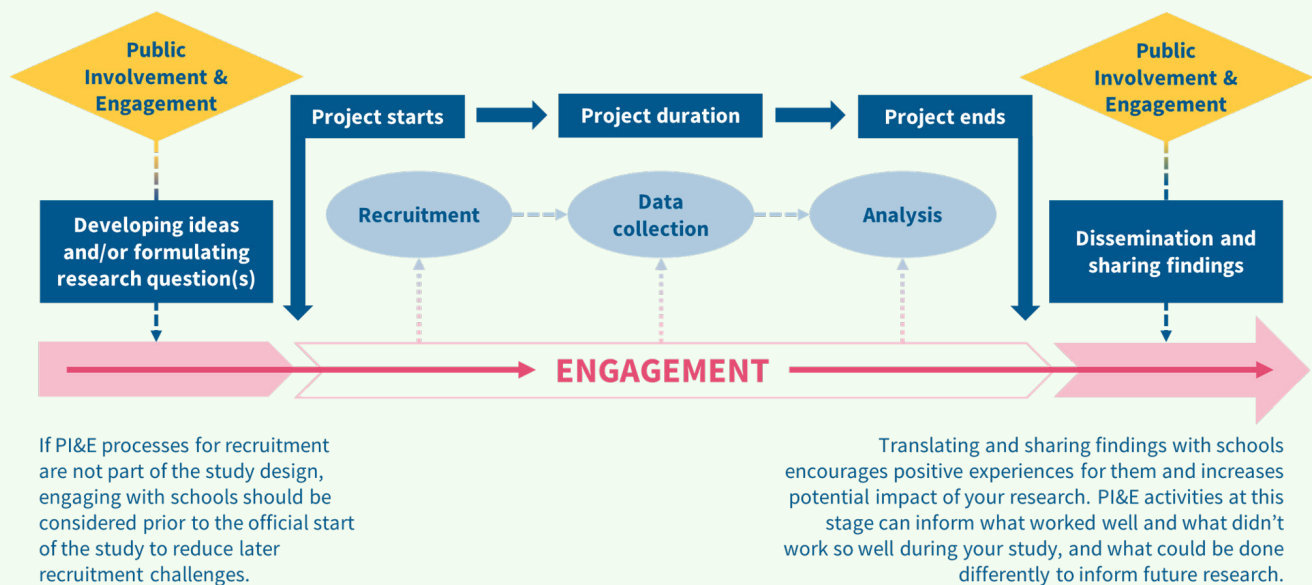
Actively seek opportunities to share your research with schools and involve them in related activities, including engaging parents where possible.

TIP 1 Use clear, accessible language and avoid unnecessary technical or scientific terminology.

TIP 2 Approach engagement as a reciprocal process, ensuring that schools benefit as much as researchers. When designing activities, consider:

- How will this activity benefit the school?
- How does it align with teaching practice or the curriculum?
- What learning outcomes will pupils gain from participation, in addition to contributing to the research?

FIGURE 1. Engaging schools throughout the research process



WHAT CAN YOU OFFER TO SCHOOLS TO ENGAGE THEM IN YOUR RESEARCH?

There are many ways to engage schools and build positive relationships. Schools often welcome visits from researchers or subject experts to share insights about their work.

Consider whether you can:

- deliver talks for teachers, pupils, and parents
- run workshops or assemblies related to the study topic to generate interest
- develop and/or provide activity sheets for pupils
- offer incentives for schools and/or pupils (where monetary incentives are included, these should be costed within the project funding)

Where capacity is limited, it is recommended that, where possible, at least one in-person activity is delivered

per year of the project. This can be complemented by other methods to maintain communication, engagement, and participant retention throughout the study.

To support ongoing engagement over the full study period, the following approaches have been used in previous studies:

- producing an annual newsletter with study updates, including recruitment progress and next steps
- sending seasonal communications (e.g., Easter, Christmas) to maintain relationships between research teams and schools
- providing pupil activity sheets designed to support the research, alongside feedback on outcomes to schools and pupils
- offering prize draws for schools, with rewards that provide value to the school (e.g. funding for equipment or book tokens)

CASE STUDIES: A RECIPROCAL APPROACH TO ENGAGEMENT

Case study 1: Promoting healthy behaviours

What is the study/why of interest to the school?

This study examined physical activity among primary school-aged children, an important public health priority given that fewer than half of children in England meet the recommended physical activity guidelines. The school was invited to extend the invitation to parents to attend a whole-school assembly supporting wider family engagement.

What was the activity?

A 20-minute interactive morning assembly was delivered to the whole school by a team of researchers. The session reinforced key public health messages about physical activity and included opportunities for pupil engagement and questions. At the end of the assembly, researchers shared the [UK Chief Medical Officer's Physical Activity Guidelines](#) (publicly available resource) with staff, pupils, and parents.

Benefit for the school

Pupils learned about the importance of physical activity for both physical and mental health directly from researchers, with opportunities to ask questions and engage in discussion. The assembly supported delivery of the health education curriculum in an accessible and engaging format, and was welcomed by the school community.

Benefit to the research

The activity engaged teachers across all year groups and encouraged participation from parents, who attended and asked questions. This enhanced whole-school awareness of the study, strengthened relationships with the school community, and supported parental engagement, an important factor in securing consent for pupil participation.



A short video of the assembly is available to [watch here](#) (from 2:24 to 4:00)

Case study 2: Co-developing research ideas on children's mental health

What is the study/why of interest to the school?

This exploratory session was designed to inform the development of research ideas on mental health among primary school-aged children, as part of developing a research proposal around social and emotional learning. Mental health difficulties among children and young people are increasing, and many teachers report varying levels of confidence in supporting pupils with diverse mental health needs.

What was the activity?

Researchers delivered a 45-minute interactive lesson to three Year 6 classes (aged 10-11 years) to explore children's understanding of mental health. Pupils were presented with fictional scenarios involving children of a similar age experiencing mental health challenges. They were asked to discuss how they would respond, including how they might offer support and who they would advise seeking help from.

Benefit for the school

The session reinforced existing mental health education delivered within the school and contributed to the ongoing professional development of the Special Educational Needs Coordinator (SENCO). Pupils developed a better understanding of how mental health difficulties may present and the range of factors that can influence emotional wellbeing, including recognising signs of sadness, anxiety, and worry.

Benefit to the research

The activity provided valuable insights into how mental health is understood by children in this age group, including their awareness of support networks and help-seeking pathways. It also identified gaps in knowledge. Findings from the session are informing the development of a research proposal focused on whole-school approaches to social and emotional learning in primary schools.

Section 2

Approaching and recruiting schools

RECRUITMENT STRATEGY

Where schools have been involved in engagement activities (see Section 1), interest and willingness to participate may already have been established. Where this is not the case, engagement activities can still be embedded within recruitment strategies to support understanding and uptake.

Number of schools needed / recruitment targets

Studies should have a defined sample size or recruitment target for schools and/or pupils. In practice, it is often necessary to invite more schools than the target sample (sometimes up to twice as many) to account for non-response or refusal.

School size should be considered when planning recruitment. While larger primary schools may appear to offer higher participant numbers, it is important to ensure that the final sample remains representative and reflects the diversity of the population of interest.

Location of schools

Consider whether schools will be recruited from a single locality or across multiple regions. This will influence both the feasibility and the representativeness of the sample.

Engagement during recruitment

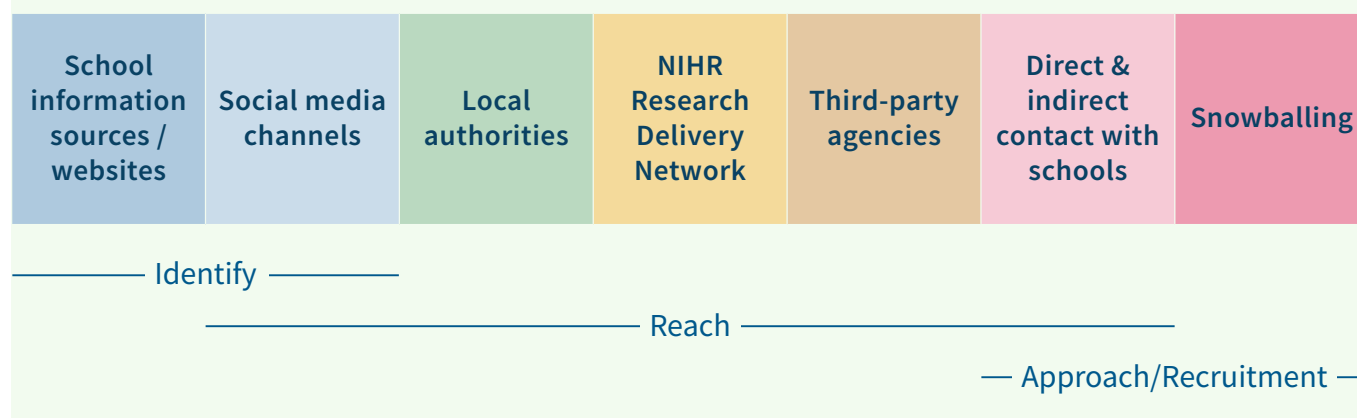
Schools may request opportunities to speak directly with researchers to support decision-making about participation. These requests should be accommodated wherever possible, as they can strengthen understanding and engagement.

Where data collection is conducted remotely, offering live or in-person discussions with staff, pupils, and/or parents can help clarify the study and improve recruitment and retention.

Key consideration

Always aim to work around school availability. Demonstrating flexibility and responsiveness to teachers' schedules helps foster positive relationships and supports a better experience for schools.

FIGURE 2. Identifying, reaching and approaching schools



There are multiple pathways for identifying and engaging schools. The most appropriate approach may depend on factors including the study aims and timelines, and the characteristics of the target population.

School information sources/websites *Identify*

Publicly available data can be used to identify schools that meet study criteria (e.g., [GOV.UK Find statistics and data](https://gov.uk/find-statistics-and-data) webpage). These datasets can support the development of a sampling frame and targeted recruitment strategy.

Social media channels *Identify & Reach*

Social media platforms may provide additional opportunities to reach schools and teachers. Professional networks and teacher groups (e.g., Facebook communities) are commonly used to share resources and may support awareness of research studies.

Local authorities: public health teams or Healthy Schools programme *Reach*

Local authority (LA) public health teams can be an effective route for school engagement. With their support, studies may be promoted directly to schools within their area.

Contact details for LA teams are typically available on local authority websites. An initial online or in-person meeting is recommended to introduce the study. Presentations should be concise and clearly focused.

Healthy Schools teams often have established communication channels with schools, including newsletters and regular meetings. These can be used to promote studies, provided clear contact details are included so schools can respond directly.

Key consideration

Where LA support is available, this should be clearly stated in all correspondence with schools, as it can encourage engagement.

NIHR Research Delivery Network

Reach

The [NIHR Research Delivery Network](#) (RDN), supports the delivery of research across England. RDN teams may have established links with schools and other organisations, which can be used to support recruitment and study delivery.

Third-party agencies

Reach

Schools often work with a range of external professionals and organisations, which may provide additional routes for engagement. These include Speech and Language Therapists, Educational Psychologists, Occupational Therapists, and Additional Support Needs staff. National charities and organisations such as [Anna Freud](#), [Sport England](#), [Place2Be](#), and [National Children's Bureau](#) may be able to support engagement or facilitate access through their existing networks.

Key consideration

Data protection and school contact sharing must be carefully managed. Where schools are recruited directly alongside other routes (e.g. RDN or third-party organisations), their participation should not be shared beyond the immediate research team unless explicit permission has been given. It should be recognised that schools may receive multiple research requests, which can act as a barrier to participation and, in some cases, lead to blanket 'no research' policies.

Where appropriate, consent materials may include an option for schools to agree to their details being shared for future research opportunities.

Direct and indirect contact with schools

Reach & Approach/Recruitment

Direct recruitment may involve sending invitation letters (Appendix 2) and information sheets to schools via post, email, or telephone contact. Information sheets should follow your organisation's ethical guidelines and templates.

It is **not** considered good practice to visit schools without prior invitation or a scheduled appointment. Most school websites provide a general school office email address, and some may also list direct contact details for the headteacher or relevant staff member.

In most cases, initial correspondence will be received by the school office, which will decide whether to forward the information to the appropriate staff member. All communication should therefore be clear, concise, and easy to navigate.

Key consideration

School office staff are key gatekeepers in the recruitment process. Maintaining positive and respectful communication with them is essential.

Where recruitment is facilitated through a network or third-party organisation, invitation materials (letter and information sheet) should be provided to them for onward distribution. All materials should clearly state the research team's name, organisation, and contact details to ensure transparency and enable schools to make direct contact if required.

Some schools may have a policy of not participating in research. In these cases, the school office may choose not to forward your invitation or may respond directly to inform you of their position. Where a school communicates a 'no research' policy, this should always be acknowledged respectfully and recorded appropriately by the research team.

Identifying the most appropriate contact within a school can increase the likelihood of engagement and participation in the research. In most cases, initial contact is likely to be made with the school office, and they will direct the enquiry to the relevant member of staff, such as the headteacher, senior leadership team, or a subject/phase lead.

TIP 3 Identify the relevant staff member.

Identify the member of staff whose role is most relevant to your research (e.g., a PE Lead for a physical activity study). Where possible, address correspondence to them by name, or clearly mark it for their attention in the subject line (e.g., 'For the attention of [Teacher Name]'). Personalise invitations in this way can increase the likelihood that school office staff will forward the information to the appropriate person. Staff names are usually available on school websites.

TIP 4 Communicate professionally and respond promptly.

Maintain clear, professional, and timely communication throughout the recruitment process. Invitation letters should be presented on your research institution's headed paper, and all correspondence (including emails and letters) should include full contact details for the researcher or research team. Aim to respond to school enquiries as promptly as possible to keep interest.



...things like the original e-mail going through to the right person because you know it went through to my head teacher initially and he was very, he was very keen on anything to do with physical wellbeing and you know sports and things...

- Teacher, Focus group



TIP 5 Acknowledge all responses from schools.

If a school indicates that it does not wish to participate or is too busy, always acknowledge their response. Where appropriate, you may offer to re-contact them at a later date (e.g., in one to three months). If a school agrees to be contacted again, it is essential to follow up at the agreed time. If recruitment targets have already been met by that point, inform the school promptly that recruitment has closed, while noting that you may be in touch if circumstances change.

Snowballing

Approach/Recruitment

Schools often communicate with one another. If they have a positive experience of engaging with your study, they may recommend it to other schools or share contact details of colleagues in other schools who may be keen to take part.

FURTHER KEY CONSIDERATIONS

If your research study includes a control group

Recruiting schools or participants to a control group in observational studies and quasi-experimental designs can be challenging. Control groups act as a comparison group and do not receive the intervention or treatment, allowing

researchers to determine whether observed changes in the intervention group are attributable to the intervention itself rather than external factors.

As control group participants do not directly receive the intervention or are not engaging in a recommended approach, they may not immediately see the benefits of participation. For this reason, the clarity and strength of your study explanation are particularly important. It is essential that schools and participants understand that their involvement provides critical comparison data, which is vital for producing robust findings that can inform research and policy.

Researchers have a responsibility to clearly communicate the value of participation for control group schools and participants, ensuring they understand that their contribution is equally important to the overall success and validity of the study.

The level of information provided will depend on the study design. For example, in randomised controlled trials, participants may need to consent to random allocation to intervention or control groups, and may be blinded to certain aspects of the study to avoid influencing outcomes. In these cases, full disclosure of all study details may not be appropriate prior to participation; however, participants must still be given sufficient information to provide informed consent.

In observational studies, study materials (including recruitment information and participant information sheets) should clearly explain the role and importance of both intervention and control groups to ensure all participants understand how their involvement contributes to the research.

TIP 6 When discussing your study with schools, clearly explain the importance of including schools that do not receive the intervention (i.e., the control group), as this is essential for determining whether the intervention is effective and achieving its intended outcomes.

Ensure that study information materials do not focus exclusively on the intervention, as this may lead control group schools to assume they are not eligible to participate. Clear and balanced messaging helps all eligible schools understand their potential role in the study and encourages broader participation.

What is expected of researchers when contacting schools?

All researchers involved in school-facing recruitment (including outsourced teams) should have a thorough understanding of the study, including:

- Study aims and objectives
- Research protocol
- Data collection procedures, number and timing of data collection points
- What participation will involve for schools
- How findings are intended to inform public health research and/or policy

Being well-informed enables researchers to respond confidently to queries from schools and helps establish rapport from the outset. Where questions cannot be answered immediately, researchers should refer these to the study leads and follow up with the school once a response has been provided.

Consistency is important in building and maintaining relationships with schools. Where possible, schools should liaise with a small number of named members of the research team, as frequent changes in contact person can make it difficult to develop rapport and continuity.

Researchers should also be aware that multiple contacts are often required before a school agrees to participate. Persistence, professionalism, and timely follow-up are key to successful engagement.

When to contact schools

“ Every term is busy - probably no specific time will be a good time but once contact is made, the teacher can inform you of when is best for them.

- Teacher, Focus group ”

Schools differ in their preferences for when they are approached about research. Some prefer to plan well in advance, particularly when preparing for the next academic year. For example, contacting schools in May or June may be helpful, as this is often a period when planning for the following year is underway, and opportunities to accommodate research can be identified.

Other schools may have more flexibility and be able to consider participation at different points in the year. In most cases, researchers will not know these preferences in advance unless an existing relationship is already in place.

When first making contact, it is good practice to ask the school if there is a more suitable time to follow up, and to agree on a preferred month or term for future communication where possible.

Suitable times to contact schools:

- Approximately one week after the start of term, once routines are established
- Mid-October to early December
- October, February, and April (key planning points in the academic year)
- Spring term (excluding Year 6 during SATs preparation and assessment)
- Summer term across all year groups
- May, following completion of SATs
- June to early July – a good time for initial discussions and planning for the next academic year.

Less suitable times to contact schools:

- The start and end of any term
- First half of the autumn term, when pupils and staff are settling into new routines
- The lead up to Christmas
- School holiday periods
- The lead-up to SATs (typically March to May), particularly for Year 6 cohorts
- End of the academic year, when staff are focused on report writing and transitions

TIP 7 In general, avoid contacting schools at the following times, as staff are unlikely to be available to respond:

- Drop-off and pick-up times (i.e., 08:30–09:15 and 15:00–15:45)
- In the week leading up to school holidays (i.e., Christmas or Easter)
- At the beginning of terms, particularly in early September as teachers are settling in children into the new school year

TIP 8 For email correspondence, send messages during school hours (i.e., 08:30–15:30).

Section 3

Motivations, facilitators and barriers for schools

MOTIVATIONS, FACILITATORS AND BARRIERS FOR SCHOOLS AND PARENTS IN RESEARCH PARTICIPATION

There are different motivations for senior leadership teams, teachers, and parents to engage in research (Table 1).

A strong pitch

A strong pitch to a school should clearly show the study aligns with the school's values and/or curriculum, as this can increase interest from the outset. Keep the message simple, concise, and focused.

When presenting research to schools, consider addressing the following:

- What is the study investigating?
- Why is it relevant, and why is it being explored?
- How will it involve the school, and what time commitment will be required?
- What will happen to the data, and how could the findings improve child health?

- How will the confidentiality of responses be protected?
- What are the potential benefits for the school and its community?

During the focus group, teachers were asked to select up to three multiple choice options for how researchers could present their study to capture the school's interest. The most popular response (73%) was that researchers should clearly demonstrate how the findings would benefit pupil's health.

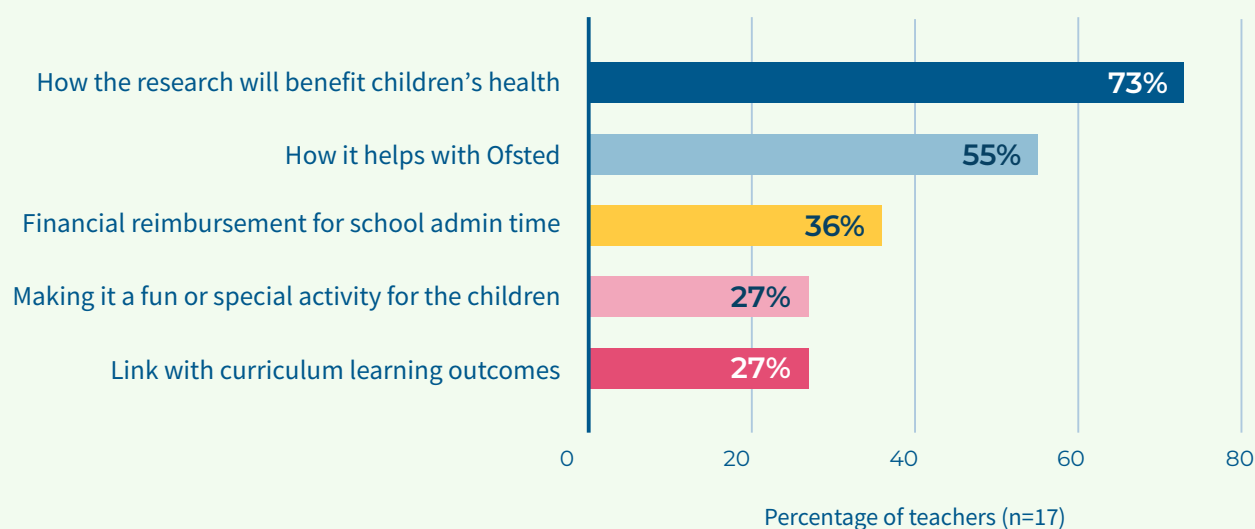
“ Teachers/school staff need to see the benefit that this has on children either in their school, locally or nationally – explained simply...

- Teacher, Focus group



FIGURE 3. Key considerations when pitching studies to schools

Teachers could choose up to three responses



Logistics

To support schools' participation, it is important to be transparent about the logistical requirements of the study.

Key considerations include:

- **Disruption to the school day**
Clearly communicate any expected impact on lessons or daily routines.
- **Time commitment**
Explain the overall study duration and timing of school visits for data collection. For example: "We're hoping to conduct the data collection within 3-4 weeks of receiving your consent to participate." Time-limited studies may be accommodated by teachers.
- **Teacher workload**
Outline what is expected of teachers, including paperwork, data collection, or parent communication. If significant time is required, consider whether financial incentives are available to cover teachers' time.

Benefits of your research to the school

- **Enhancing teacher learning**
Offer guidance for health assessment training or other teacher professional development opportunities.
- **Supporting parents and pupils**
Provide workshops or resources to help parents increase their knowledge of the public health issue under study.
- **Giving a voice**
Create opportunities for teachers, pupils, and parents to share their perspectives on child health issues.

TIP 9 Always provide schools with feedback on the study's findings, and be prepared to present results to pupils and/or parents to show how their participation contributed to the research.

TABLE 1. Motivations for schools to participate in research

Motivations for participation can vary between teachers, children, and parents, reflecting their different roles and perspectives. Below, we outline the motivations identified for senior leadership teams, class teachers, and children or parents.

Motivations for Senior Leadership Teams	Motivations for Teachers	Motivations for Children or Parents
• Gaining knowledge and insights into areas of children's health. • Supporting the strategic overview of curriculum provision by identifying strengths and areas for improvement in promoting children's health. • Monitoring the impact of interventions or practices if the research is repeated periodically. • Ensuring results are representative of the entire school, ideally involving pupils from all year groups rather than focusing on a single year group. • Receiving incentives, such as funding or equipment, that can benefit the school. • Receiving guidance on accessing advice, tools, or surveys to monitor children's health, enabling targeted support for students.	• Interest in the research topic, such as health impacts from COVID-19. • Opportunities to enhance lessons with practical ideas tailored to children's needs. • Linking the research to the curriculum adds value to teaching. • Research topics that engage teachers and can be shared with children and the wider community. • Supporting the wellbeing and development of current and future students. • Minimising workload by having researchers manage most of the process. • Allowing children to choose whether to participate, without making it compulsory.	• Understanding how children's health compares to peers locally and nationally. • Receiving feedback on how the research can improve health, motivating healthier choices at home. • Learning how parents can support their children, for example, through follow-up workshops explaining the findings. • Making the research experience enjoyable for children, helping them feel valued and engaged (e.g., using activity watches rather than completing a survey). • Providing rewards or incentives for children, such as stickers or badges.

Barriers that may prevent schools from participating in research

Schools may face a range of barriers to participation, including factors beyond their control:

- **Time pressures**
Delivering the curriculum is the school's top priority. Time-sensitive research with little flexibility is unlikely to be viewed favourably.
- **Costs**
Studies that require teacher training or additional resources can create financial implications, such as arranging for replacement staff.
- **Research topic**
Research that is poorly pitched, not relevant or engaging to schools is less likely to gain participation.
- **Workload**
Studies demanding significant teacher involvement, including training, administrative tasks, or paperwork, can add to already heavy workloads.

TIP 10 Keep the school's workload to a minimum. Simpler participation makes the study more appealing.

- **Disruptions to the school day**
Extended interruptions can impact pupils' learning and may discourage participation.

- **Diverse population groups**
If English is not the first language among parents, teachers are aware that parents may be less likely to engage, resulting in lower recruitment rates. In these instances, schools are less likely to participate in studies.

TIP 11 To engage diverse groups, provide study letters and information sheets in multiple languages where possible. Consider offering to speak with or present the study directly to parents at the school.

TIP 12 Keep study documents simple and concise. Lengthy or wordy materials, particularly for parents with English as a second language, are less likely to be read or understood.

TIP 13 Consult with the school about how they usually communicate with parents, whether it is by email, paper copies, or both. Be flexible: if online responses are low, provide paper copies to increase engagement. Materials available only online are less accessible to parents with language barriers.

Teachers participating in a children's physical activity research study shared that they were grateful that participation did not increase their workload:

“ I was so impressed with the fact that you did do all the admin... ”

“ I think that was the winning thing, that nobody [at the school] had to do anything...and also [liaising] with the parents as well, you did all of that... ”

Section 4

Visiting the school

ARRANGING AND CONDUCTING SCHOOL VISITS

Setting up a date and time to visit the school

Visits to schools, whether to introduce the study or collect data, should always be scheduled at the school's convenience. When arranging a date and time, clearly reiterate the duration of the visit and the space required.

- **Space requirements**

Determine how much space you need for assessments. Schools will try to accommodate you, but the available space may be smaller than anticipated. Adapt to the space provided, and always return furniture to its original position after use.

- **Number of pupils assessed at a time**

If pupils need to be removed from class, discuss with teachers how many can be accommodated at once with minimal disruption.

School visits are usually scheduled in advance, but do not assume that teachers will remember the date. Send a reminder

email or call during school hours the day before the visit. Avoid sending reminders outside school hours, as they may not be seen in time for the school to notify you of any changes. Frame your reminder with the expectation that the visit is going ahead, rather than asking if it will take place.

For example:

Dear [teacher's name],

A quick reminder of my visit to you tomorrow [day, date], at [time].

As agreed, I will arrive by [time] and the whole visit will last around [duration]. I look forward to seeing you tomorrow.

Kind regards,

[Researcher name, organisation, email address, telephone number]

Arriving at the school

Always plan ahead and allow extra time for possible travel delays. Arriving 10-15 minutes before the agreed time is usually sufficient, especially if equipment or assessment set-up is required.

Allow time to sign in, be greeted by a teacher and be taken to the room arranged for the visit.

Key consideration

If you arrive early:

- Do **not** enter the school before the advised 10–15 minute window.
- Do **not** wait directly outside the school or in the playground.
- Plan your journey in advance. If using public transport, identify a nearby café or safe waiting area. If travelling by car, check parking availability and local rules, as not all schools provide visitor parking.

If you are late:

- Contact the school as soon as possible, providing an updated expected arrival time. Ask the office to inform your liaison or the relevant class teacher(s).
- If the delay means your visit will take longer than planned, inform the class teacher upon arrival and adapt to their schedule. Do **not** attempt to make up time during breaks or lunch unless suggested by the teachers.

Being fully prepared

Be well-prepared for your school visit. Upon arrival, reiterate the duration of the visit. Bring all the necessary paperwork, such as questionnaires, in sufficient quantity. If you run low on copies, inform the teacher or school office that you will provide the additional copies by post or drop them off. They may offer to make copies, but please do not request it; allow them to offer.

TIP 14 Always have your DBS certificate with you. Avoid relying on an online link, as this creates extra work for the school. Without a DBS, you cannot accompany pupils alone, and a Teaching Assistant may not always be available to mitigate this. If your DBS is only available online, send it to the school liaison (copying the school office) in advance of the visit.

TIP 15 Always wear your ID badge visibly, including upon arrival at the school.

During the visit

- **Privacy considerations**

If pupils are assessed unsupervised, ensure privacy while keeping the door open where possible for safety.

- **Audio or visual recording and photography**

Obtain all necessary permissions before taking recordings or photos, including when children's faces are not visible. Do not use personal mobile phones for recording. Exclude any children without consent from photos and recordings, and delete images that include them.

TIP 16 Always share photos with the school in the first instance, removing any images of children without parent/carers consent. Transfer files securely and let the school confirm which photos are acceptable and whether any further deletions are needed. In some cases, children's faces may be permitted, but school branding (e.g., uniforms) should be obscured. Check whether the school is happy to be acknowledged. These steps ensure all images in the public domain have valid consent. Teachers may also take photos during your visit and share them with you for research promotion.

- **Manage your time at the school efficiently**

Avoid scheduling data collection near drop-off or pick-up times, as this is often disruptive. However, introducing the study to pupils can be effective about 30 minutes before pick-up, so the study is fresh in their minds to share with their parents or carers.

Schedule assessments around school breaks and lunch times; children should not miss these, and work efficiently, allowing time for a few questions from children, but avoid staying longer than necessary at the school.

Key consideration

- **Be flexible:** Adapt to the needs of teachers and children, as plans may change upon your arrival.
- **Respect accompaniment:** If a teacher accompanies you during your visit, accept this without question.
- **Follow school rules:** Always adhere to the school's policies and guidelines.
- **Mobile phone etiquette:** Do not use your phone in the presence of staff or children. Keep it switched off or on silent for the duration of your visit.

At the end of the assessments

At the end of data collection, it is important to acknowledge pupils' participation. Small tokens of appreciation, e.g., stickers featuring your study logo, are always welcome. If you are providing certificates (Appendix 3) or other incentives, plan carefully when to distribute them (i.e., either on the day of the assessments or after verifying that all data is complete). This approach ensures children feel valued while maintaining the integrity of the study.

Section 5

After data collection

SHARING KNOWLEDGE: “GIVING BACK” TO THE SCHOOL

Following your visit, promptly email your school liaison to thank them for accommodating you and supporting the study. If any incentives were offered to the school or participants but not issued on the day, let them know when to expect these. Use this correspondence to remind the school of any further actions required, outline when you will share study findings, and provide details of any future visits.

Schools understand that data analysis takes time, so provide realistic timelines for sharing results. If delays occur, make every effort to update the school with revised timelines to maintain transparency and trust.

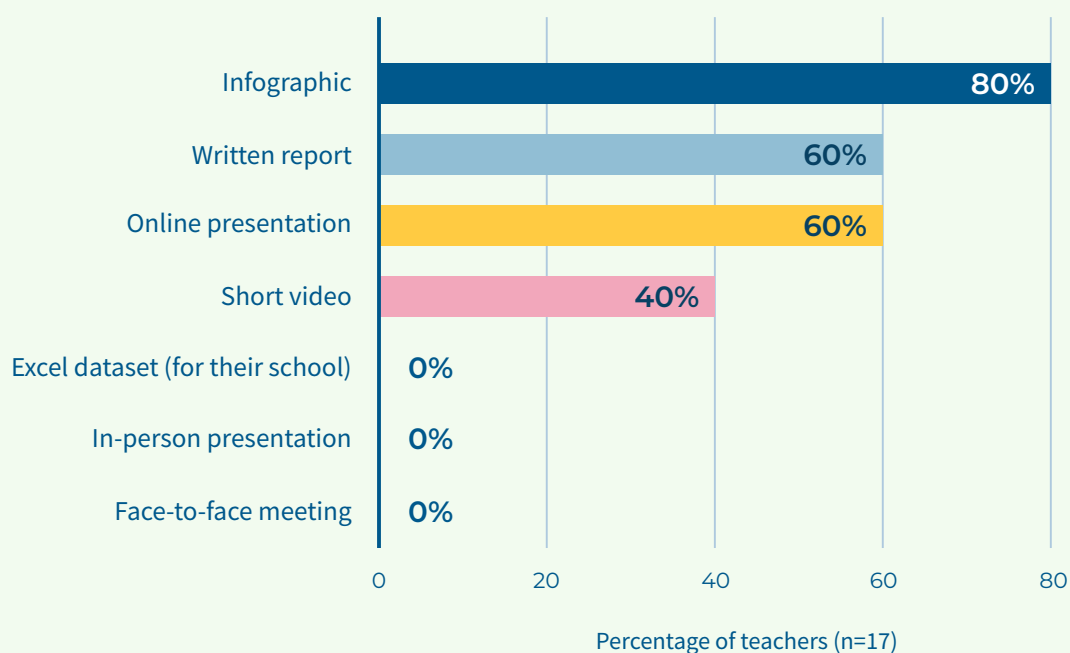
Sharing study findings

Once the study data have been analysed, share a summary of the findings with the school. Schools are generally most interested in results specific to their own setting. Providing descriptive data in an infographic can be particularly effective, including information such as the number of children invited, the number who participated, and outcomes presented by demographic characteristics, e.g., sex, age (if multiple year groups were involved), ethnic group, or other relevant measures. This approach makes the findings accessible, engaging, and directly relevant to the school community (Appendix 4).

During the focus group, teachers were asked to select up to three preferred formats for receiving study feedback. The most popular choice (80%) was an infographic. These visual, user-friendly formats effectively highlight key points and can be easily shared with children and parents.

FIGURE 4. Preferred methods for receiving study findings

Teachers could choose up to three responses



All feedback should use clear, accessible language and formats suitable for teachers, children, and parents. Schools should be able to share the feedback with parents, so it must be easy to understand. Creating school-specific feedback can be very helpful and is often of great interest to each school.

“ We don’t really get to measure in this way, and obviously, going forward, it would be helpful. ”

“...a useful thing if once we’ve got our data and we know what our data is telling us, we can then brainstorm ideas of like, well, this is what my data tells me. ”

“ It would be useful to have any data that we can give to parents as well, not just to, you know, to use within school, but actually to encourage parents to do more if they can outside of school. ”

Feedback tailored to a particular school should not be shared with other schools. If a school chooses to share its feedback with others, this is the school’s responsibility.

TIP 17 Involve teachers, parents, and children in creating infographics to make them more engaging and effective for your audience.

Outreach sessions

Schools may invite you to present your study findings to teachers, children, or parents. Researchers should, whenever possible, accept these opportunities, as they provide a positive conclusion to the school’s participation. Sessions can be interactive and enjoyable for children, and may include handouts or activity sheets to reinforce key messages.

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APPENDIX 1

Engagement with schools throughout the study period

BEFORE	Early communication exploring ideas with schools to generate research questions
	Identifying schools representation, generalisability
	Approaching and recruiting different methods and pathways
	Outreach activities workshops, assemblies
DURING	Contact and visits identify relevant teacher, best and worst times to contact and visit schools
	Workload minimise responsibility for teachers
	Flexibility / adaptability accommodate the needs of schools/teachers
	Duration minimise disruption to children's learning
AFTER	Incentives for the school / children
	Feedback share results and findings of your research
	Opportunities provide opportunities for teachers to discuss the findings and what it means for them
	Impact involve schools to help distribute key message of your findings to reach wide audiences and maximise impact

APPENDIX 2

Example invitation letter to schools

This example can be used as an email invitation or for paper invitations. If sending letters using paper copies, always use your organisation's headed paper.

Dear *[Headteacher / relevant teacher name / PE Lead / Pastoral Lead]*

RE: *[Name of the study]*

We are carrying out an exciting new study to examine *[brief, simple description of the study]*, which aims to address *[one or two sentences on why this is important, e.g., 'less than half of children in England meet recommended guidelines for physical activity']*.

We would like to ask for your help with our research on *[topic of your study]* among children. This involves inviting *[specify year group(s)/whole school]*, and their parent/carer(s) to take part and complete *[state measures/assessments/questionnaires; for child assessments, specify that these will take place in school]*.

The information we collect will be used to investigate how schools can be better supported to improve children's health and wellbeing. Upon successful data collection, participating children will receive *[state incentive]*, and the school will receive *[state incentive, if applicable]*.

All the data we collect will be confidential, and no schools/parents/children will be identifiable from their responses.

We would be very grateful if we could arrange a convenient time to speak with you to tell you more about the study, after which you can decide whether you would like to participate. We are inviting schools across *[region/area]* and hope you will consider being part of this important study. Please get in touch with us at *[study email address]* if you have any questions or would like to know more about this study.

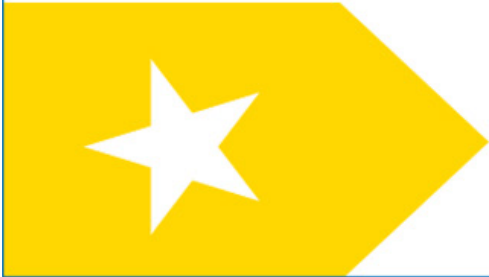
We look forward to hearing from you.

With very best wishes,

[Name of PI, Study Lead, and Team members]

APPENDIX 3

Example children's certificate



Imperial College London and the Child Health Unit
proudly present:

With the honourable title of
Junior Public Health Scientist

In recognition of outstanding participation in the HAPPY study

Name of PI
Organisation

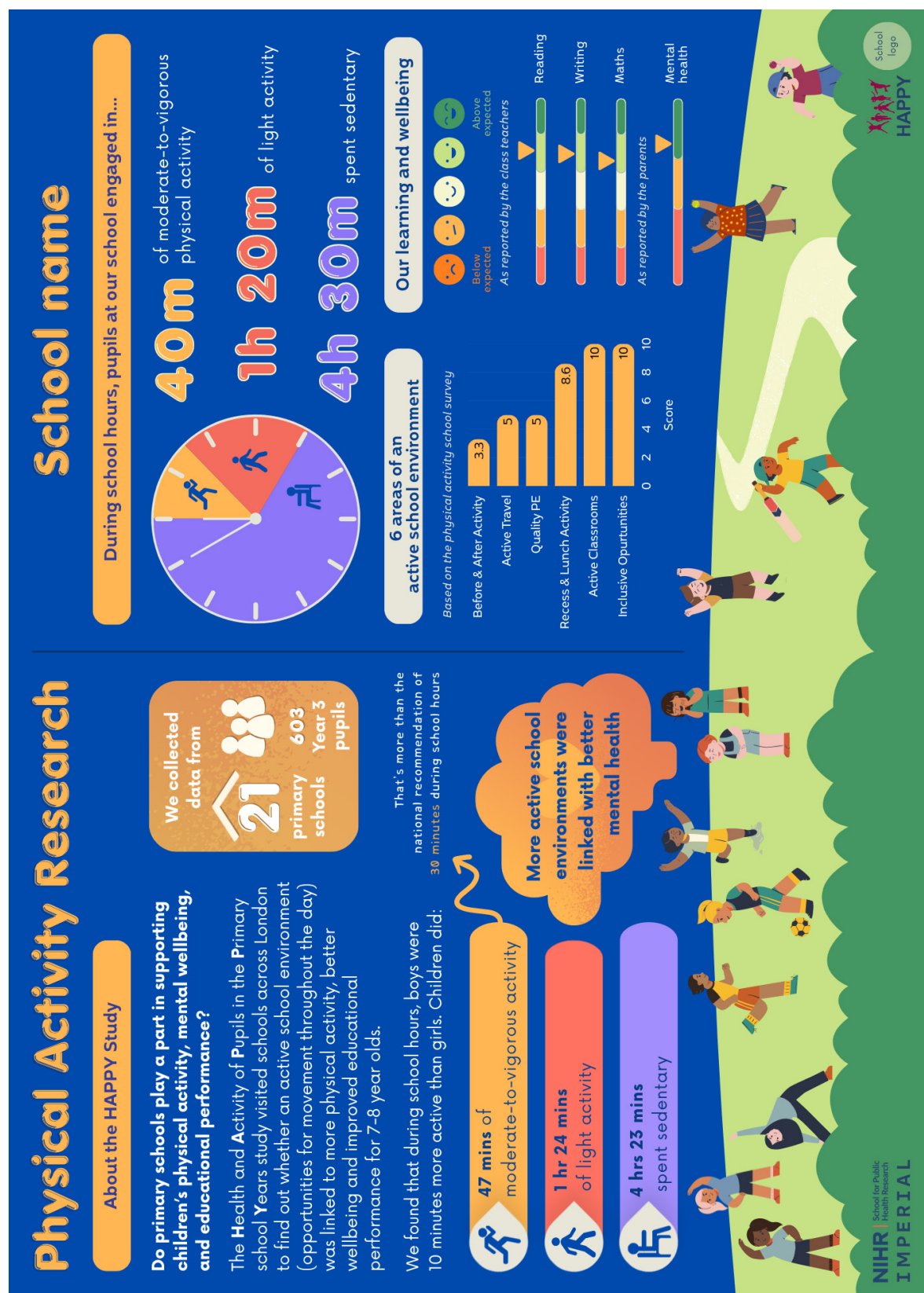
Names of researcher/ research
team name





APPENDIX 4

Example infographic of study feedback



ANNEX 1

Additional information: secondary data

Secondary Data

A range of school-level data is available from publicly accessible administrative datasets. These open-source datasets can be used freely to obtain general information about schools and their characteristics, including pupil numbers, gender distribution, number of pupils with special educational needs (SEN), pupils with English as a second language, and those eligible for free school meals.

- [Get information about schools](#) (GOV.UK)
- [School pupils and their characteristics statistics](#) (GOV.UK)

School outcome measures relevant to public health (including Ofsted reports, exam and test results)

- [Ofsted reports](#) (GOV.UK)

Identifying deprivation level

- [Open Data: Indices of Multiple Deprivation](#) (GOV.UK)

Child outcomes relevant to public health

- [Fingertips Public Health Tool](#) (GOV.UK)
- [Children with special educational needs: extra help](#) (GOV.UK)
- [National Child Measurement Programme](#) (NHS England)
- [Sport England Active Lives data](#) (Sport England)



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a practical toolkit for researchers**