TOOLKIT for Making Written Material Clear and Effective

SECTION 3: Methods for testing written material with readers

PART 6

How to collect and use feedback from readers

Chapter 16

Tips for recruiting people by telephone to set appointments for feedback sessions

U.S. Department of Health and Human Services
Centers for Medicare & Medicaid Services

TOOLKIT Part 6, Chapter 16

Tips for recruiting people by telephone to set appointments for feedback sessions

List of figures in this chapter:

This document is the sixteenth of 19 chapters in Part 6 of the *Toolkit for Making Written Material Clear and Effective*. The Toolkit has 11 Parts. It was written for the Centers for Medicare & Medicaid Services (CMS) by Jeanne McGee, McGee & Evers Consulting, Inc. The guidelines and other parts of the Toolkit reflect the views of the writer. CMS offers this Toolkit as practical assistance to help you make your written material clear and effective (not as requirements from CMS).

Introduction

This is the last in a series of three chapters about how to select and recruit participants for your feedback sessions. The previous chapters in Toolkit Part 6 covered the basics of selecting and recruiting participants (Chapter 14) and gave tips on how to recruit people in person (Chapter 15). In this chapter, we offer tips for recruiting participants by telephone.

Should you send a letter to let people know they might be called?

When you are recruiting by telephone, it can be helpful to let people know ahead of time that you will be calling. Many people are wary when a stranger calls, especially if they get frequent telemarketing calls or have heard about telephone scams. They may use caller ID to screen your call, or hang up before you have a chance to explain why you are calling.

If you have concerns about being able to get through to potential participants by phone, consider sending them a letter in advance to explain about the sessions and let them know you will be calling. Sending a letter in advance gives you an opportunity to establish the legitimacy of the project and address any concerns that you think people may have, such as wondering how you got their names.

Who should send the letter?

Who should send the letter varies by project. You might send the advance letter on your own letterhead. In other cases, it might go out from a sponsoring organization, or from the organization that supplied the information you are using to contact prospective participants.

When should you send it?

If you send an advance letter, be careful to coordinate when you send the letter and when you follow up by telephone. You don't want to start calling before the letter arrives, but you don't want to wait too long, either, or people will forget what's in the letter.

What should it say?

Letters sent in advance typically include the following kinds of information:

- **Who is sponsoring the project**. The letter can lend legitimacy to your project and encourage participation by showing people which groups are sponsoring or endorsing the project. If you are mentioning any stakeholder organizations in your letter, be sure to coordinate closely with these organizations to get their approval of the text and timing of the mailing, and give them a copy before the letters are mailed. You want them to be well informed and prepared to handle any questions they may get from people who receive the letter.

- **The purpose of the project and what is involved.** Your letter should begin with a friendly, personal pitch that states why you are writing. Give a brief but specific description of what the interview or focus group will be about and what you are asking them to do. You can say something about the voluntary nature of the project, so that people will not feel pressured to participate.

- **When and how you will be contacting them.** The letter should give an *approximate* time frame, such as, *you may get a call sometime in the next few weeks*. It's important to avoid being too specific or making any promises that you will definitely call:

    - When you write the text for your advance letter, keep in mind that you will stop making calls as soon as you find enough participants. You may want to acknowledge this directly in the letter. For example, you could use wording such as the following: *Since we only need to find a small number of people to be interviewed, it is possible that you won't be called.*

    - Instead of giving a specific time (such as, *next week*), keep your wording more general (such as, *sometime in the next few weeks*). Giving a general time frame allows the flexibility you need. You can't know ahead of time when recruiters will call a particular person or how many attempts it may take to get through.

- **The name and phone number of a person they can contact if they have questions or concerns.** If you can, give people an easy way to refuse in advance, because it will make recruitment more efficient.

    - For example, you could say, *If you have questions, or if you want us to take your name off the list so that you won't be called about an interview, please call* {name of person} *at* {phone number}.If you do give people a number to call to ask to be taken off the list, make certain that you have a good system in place to ensure that they won't be contacted.

- When people call to have their name taken off the list, getting their reasons can be helpful. Suppose, for example, you learn that people are refusing to participate because they misunderstood part of the letter or have a concern that you didn't address. You may be able to fix the problem and improve recruitment.

Creating a telephone recruitment script

Figure 6-16-a below gives you step-by-step instructions for writing a telephone recruitment script.

Figure 6-16-a. Template for creating your own telephone recruitment script.

1 Introduce yourself and tell why you are calling

The beginning of the script is crucial, because you only have a few moments to convince people that your call is worth their time and attention. Here are some suggestions:

Start your script with a carefully worded sentence or two that gives them essential information and addresses any concerns they may have. For example, you may need to say up front, *I'm not selling anything*. Keep the script conversational. Avoid bureaucratic language. Consider whether it makes sense for your project to refer to payment up front, or wait until later in the recruitment conversation. Usually, it's better to wait until you are sure they meet your requirements and they understand what would be involved if they agree to participate.

Usually, it's wise to refer immediately to the sponsoring organization or stakeholder organizations. Try to work in a brief description of organizations you mention, especially if you think people won't recognize them by name.

- Here's an example from the sample script shown later in Figure 6-16-b: *Hello. My name is __________ and I'm calling from the Bayside Alliance for Healthy Children, a non-profit group that helps children get the health care they need. We are working with Bayside City schools on a new booklet of information for families with young children.*

- If you are using a professional research firm to make the recruitment calls, the recruiter should introduce themselves as “calling on behalf of” the sponsoring or stakeholder organizations, rather than giving the name of their research company. Of course, they should also give the name of their research company if asked.

Train recruiters to be flexible and follow the lead of the potential respondent. While you want to prepare a script that is suitable for recruiters to use verbatim, the recruiters will need to adapt this script depending on how people respond. People get annoyed when a caller makes a long speech that doesn’t include any natural pauses, so be sure that the script and recruiters are “interruptible.”

Make sure that your script includes answers to frequently-asked questions, such as *How did you get my name?* It’s helpful to prepare a separate page of answers to frequently asked questions for easy reference. You can update this page if any new questions come up after recruiting is underway.

2 Ask screening questions to see if the person meets requirements

In this section of the script, you make sure that people meet the requirements for participation. If they don’t, you thank them and end the call. The requirements you set and how you need to screen for them differs from study to study.

Typically, you start the screening section with an introduction that sets up a context for asking direct questions. For example, you might say, *If it’s okay with you, I’d like to ask a few questions*.

As you write your screening questions, think about what sequence makes the most sense. In general, it’s best to ask the broadest screening questions first, and save any that are about potentially sensitive topics for later on. When you ask screening questions, be sure to follow whatever privacy protection rules apply.

Format the screening questions with check boxes for marking the answers. To make it easy for the recruiter, the questions should have an easy way to mark the answer and instructions that tell the recruiter what to do next depending on the answer that is given. The sample script in Figure 6-16-b illustrates one way of formatting your screening questions.

3 Be specific about what's involved; give assurances if applicable

In this section of the script, you explain what would happen in the feedback session and how long it would take. **This is where you emphasize that reading will be required**. By emphasizing that reading skills will be required, you make it easy for a non-reader or poor reader to say no without giving a reason, and avoid the awkwardness and embarrassment of pressing people to tell how well they can read. Here is how the need for reading is emphasized in the sample script from Figure 6-16-b: *Later this month, we will interview some parents to find out whether the booklet is easy to read and understand. If you are interviewed, we would ask you to read the booklet and give your reactions.* (For more on this topic, see Figure 6-14-b, *Tips for recruiting people who will be able to read the material you show them*, in Chapter 14, *How will you select and recruit participants?*)

Give any assurances that are appropriate for your project. For example, if you are addressing any sensitive issues, you could tell how you will protect people's privacy.

You may also want to tell more about the purpose of the project and how feedback will be used. For example, here is wording from the sample script in Figure 6-16-b: *and the schools would use what you say to improve the booklet before they send it out.*

4 Ask whether the person might be willing to participate

Once you know that the person meets the requirements, you can ask about interest in participating. For example, you could say, *Does this interview sound like something you might be willing to do?* This wording leaves room for the person to ask questions or change their mind when they hear more.

5 Give the details, answer questions, set the appointment

If the person might be willing to participate, you can give the details about compensation, help with transportation, etc. You should also offer to answer any questions. For example, you could say, *We are offering a $25 grocery store gift certificate as a thank you for your time. Do you have any questions?*

Then you are ready to schedule an appointment for a specific time and place. When you set up the times for appointments, **be sure to allow ample time between the interviews**. Interviewers and note takers need a few minutes after each interview to review their notes and write a brief summary of findings. They also need to take time for lunch and occasional breaks. In addition, allowing time between interviews gives the flexibility they need if people arrive late for an appointment or if an interview runs a bit longer than planned.

6 Collect contact information for follow-up

The final step is to ask for contact information: Ask for a mailing address, in order to send a confirmation letter. Ask for phone numbers and best times to reach the person, so that you will be able to make a reminder phone call a day or two before the session.

Source: Adapted for this Toolkit based on scripts and training materials used by the writer in various projects.

Example of a telephone recruitment script

Figure 6-16-b below gives an example of a telephone recruitment script. This script illustrates how to apply the template shown above in Figure 6-16-a.

Figure 6-16-b. Example of a telephone recruitment script.

In this fictional example, a community-based outreach organization, the Bayside Alliance for Healthy Children, is working with the local school district to let parents know about the Children's Health Insurance Program. Together they have completed the first draft of a new information booklet for parents and guardians. Now it's time to do interviews with parents to see whether the booklet is easy for them to understand and use.

Staff members at the Bayside Alliance are recruiting participants by telephone, using a list they got from the school district. To make it convenient for parents, interviewing will be done at the school, either during school hours or in the evening. For those who come in the evening, the project is offering to pay for babysitters. To make sure that the booklet is relevant to the participants, the project wants to interview parents or guardians of children with no health insurance coverage. Here is the recruitment script they are using:

Bayside Alliance for Healthy Children

Telephone Script for Parent-School Project

Telephone recruitment guide

When you have the right person on the line, introduce yourself and tell why you are calling:

Hello. My name is __________ and I'm calling from the Bayside Alliance for Healthy Children, a non-profit group that helps children get the health care they need. We are working with Bayside City schools on a new booklet of information for families with young children.

Later this month, we will interview some parents to find out whether the booklet is easy to read and understand. If you are interviewed, we would ask you to read the booklet and give your reactions. We would pay you for doing this and the schools would use what you say to improve the booklet before they send it out.

I'd like to ask you some questions, if I may, to find out if you meet the requirements for this project.

> RECRUITERS: Answer questions and explain more about the project, as needed.
>
> If the person volunteers to be interviewed, say "That's great, but first I need to ask you a few questions."

Ask screening questions to determine whether the person meets requirements:

1. Do you have any children in your home who go to a Bayside City elementary school?

    - ☐ Yes ---> *continue.*
    - ☐ No or refused to answer ---> *thank and end the call.*

(continued on the next page)

2. Are these elementary school-age children currently covered by health insurance?

- ☐ Yes ---> *thank and end the call:* I'm sorry – for this project, we need to talk with parents of children who are not covered by health insurance.
- ☐ No ---> *continue.*
- ☐ Refused to answer ----> *thank and end the call.*

Emphasize the reading task and check on willingness to participate:

3. Thank you for answering my questions. If you come for an interview, we would ask you to read the booklet and give us your reactions. We plan to tape record what you say to make it easy to share your comments with the people who are trying to improve the booklet. Does this interview sound like something you might be willing to do?

RECRUITERS: Offer to answer any questions they may have.

- ☐ Yes or maybe ---> *continue.*
- ☐ No or probably not ---> *thank and end the call.*

Invite to an interview. Give the details and set an appointment:

I'd like to invite you to be interviewed as part of our project. The interview will be held at your child's school, during school hours or in the evening. It will last about 45 minutes. At the end of the interview, we will pay you $25 as a thank you.

Could you come to the school for your interview on {*insert date or dates*} at {*time or times*}?"

If the appointment is in the evening, explain about child care:

Since you are coming for your interview in the evening, we can pay for a babysitter if you need one. The school has told us that parents *cannot* bring children to interviews in the evening, because no one will be there to supervise them.

(continued on the next page)

After the appointment is set, confirm contact information:

I will send you a letter that gives the details about your interview. Is your address {*read address from your calling list*}? And what are the best phone numbers to use if I need to reach you during the day or evening?

Thank and end the call:

Thank you so much. We look forward to seeing you on {*date*} at {*time*}. If you use reading glasses, please be sure to bring them to the interview.

Source: Fictional example created for this Toolkit.

Tracking responses to your calls

When you are doing telephone recruitment, recruiters will need a tracking form to record the date and time of each call you place, and the outcome of that call. You can design a paper or computerized format for this tracking form:

- For many projects, the form can be short and simple. If you are using quotas to ensure a particular mix of participants, the form will be need to be more detailed to keep track of how you are doing on each quota.
- It is helpful to include check boxes or some other easy way to record typical outcomes of calls, such as "not at this phone number," "no answer," "not home - call back at _____ on ______," "did not meet requirements," "refused to participate," and "made appointment."
- To help monitor the progress of recruitment, you may want to keep track of which requirements people did not meet. Generally, it is not a good idea to press people to say why they don't want to participate, but it can be useful to record any spontaneous reasons they share (such as "not interested," "can't come because of work schedule," or "will be out of town").

Following up on appointments you have made

Send a confirmation letter and map

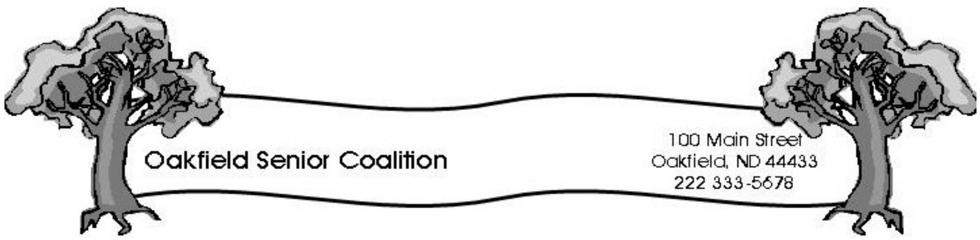
Soon after you set an appointment, send a confirmation letter that gives the following information:

- **A brief recap about the project itself**, emphasizing its purpose and how the participant will be helping.
- **Details about the appointment time and place**. Don't bury the appointment details in a paragraph of text. Instead, make them very prominent for easy reference, as shown below in the sample confirmation letter in Figure 6-16-c.
- **Directions about how to reach the location**. Unless written directions are extremely simple (as they are in the example that follows), include a map. It's very important to proofread and test the written directions and map, so that you don't tell people to "turn left" when you really meant to say "turn right." Just because directions have been used before doesn't guarantee that they are accurate and easy to follow.
- **Text that emphasizes the importance of showing up, and gives contact information.** It's wise to include a name and number in your letter, so that people can call if they have questions or need to cancel the appointment.
- **Any reminders that apply**, such as a reminder about bringing reading glasses.

Professional research facilities have their own templates for confirmation letters. Some letters produced by professional facilities are excellent, but others could use some improvement. Before you use their template, review it for content, tone, and formatting. Make sure that the language is clear and simple so that it will be easy for people to understand. For example, the tone and vocabulary may seem too bureaucratic, or the print may seem too small for easy reading. Make any edits you feel are needed, and decide whether the letter should go out on your own letterhead or the facility's letterhead.

There's a sample confirmation letter in Figure 6-16-c below.

Figure 6-16-c. Example of a letter sent to confirm an appointment.



Dear Janet Owens:

Recently we called and talked with you about a booklet that Oakfield Senior Coalition is working on. It tells about health care resources and recreational activities in our community for people who are 65 and older. We are interviewing people to get ideas on how to improve this booklet.

We are so pleased that you are willing to come for an interview and give us your reactions to the booklet. Here is what we agreed on for your interview:

Date: **Wednesday, December 10, 2008**

Time **2 pm to 3 pm**

Place: **Oakfield Library in meeting room A.**

The library is on the corner of Oliver Street and 4th Avenue. There is free parking in the Oliver Street ramp next to the library. Or take Bus route 16 and get off at the library stop.

This interview involves reading the booklet, **so please be sure to bring your reading glasses if you use them**. At the end of the interview, we will pay you $35 as a thank you for helping with this project.

Since we are only able to interview a small number of people, we are counting on you to keep this appointment. **If you find that you cannot keep the appointment, or if you have any questions, please call us at 333-5678**.

Source: Fictional example created for this Toolkit.

Remind people to come to the session

To help ensure a good turnout, issue a reminder shortly before the session. You can do this by phone or by sending a postcard. If you did your initial recruitment contact by e-mail, you might want to send the reminder by e-mail as well.

Monitor the progress of recruitment

Stay in close touch with recruiters to answer any questions that may come up and to monitor the progress of recruitment for your sessions. Ask for regular progress reports so that you an act quickly to make adjustments if things are not going as well as they should. To be sure that you are recruiting the right mix of participants for your project, these progress reports should include the characteristics of the people who have agreed to come for an interview or focus group.

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