Recruitment and Retention of Leaders and Participants

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This webinar will be recorded and available on the AZLWI Website under Partner Login after the call.

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- Your line will be automatically placed on mute.
- Please raise your hand if you have a question/comment.
- Please utilize the chat function to share information.
- Please ask questions by the question function ONLY until the Q & A portion at the end of the call.
Objectives

After viewing this webinar, leader will:

- Have an expanded knowledge about the elements that go into recruitment of participants for self-management workshops
- Be familiar with a broad range of tools to enhance retention of participants
- Identify basic principles for recruiting new leaders
- Know how to maximize retention of workshop leaders
I. Why is this important
II. Recruiting Workshop Participants
III. Retaining Workshop Participants
IV. Recruiting Facilitators
V. Retaining Facilitators
VI. Summary
VII. Discussion
Why is this important?

RECRUITING/RETAINING PARTICIPANTS
RECRUITING/RETAINING FACILITATORS
Recruiting/Retaining Participants

- Group Dynamics
- Fidelity
- Workshop Cost
  - 6 participants = $583 per person
  - 10 Participants = $350 per person
  - 12 participants = $292 per person
- Morale
Recruiting/Retaining Facilitators

- Quality not quantity
- Facilitators are the heart and soul of Healthy Living
- Safety
- Reputation
- Strong, experienced leaders are invaluable
Recruiting Workshop Participants

- STRATEGIC PLANNING
- CONSIDER TIMING
- REACH OUT AND STAY IN TOUCH
- LOGISTICS
- MARKETING
Think strategically

- Population targets, age, race/ethnicity, gender, special conditions
- Program locations
- Potential partners
Think Strategically

- Develop a plan that sets out measurable objectives over a given period of time for recruitment and marketing efforts
- Who do you want to recruit? Where are they? Where do they congregate? Where do they get their information?
- Target your message: Feel better! Take control of your life! These messages resonate.
• Advanced planning – aim for at least 2 months

• Time of person to systematically recruit
Before scheduling a workshop, make sure it is:

- Not at the same time as other valued programs
- Scheduled for attractive time and day of week
- Not going to run into major holidays
- In partnership with an insider
- Timed for sufficient recruitment of participants
Recruitment - Location

- Is a central location for those you want to reach
- Has a critical mass of potential workshop participants or can partner with a 2nd site
- Has an in-house advocate for workshop
- Meets workshop accommodation needs
Many potential participants lost

Set up simple database to:

- Keep track of those who have indicated an interest
- Capture contact information
- Identify ambassadors
Recruiting – Get your message out!

- Don’t wait. Start getting the word out 8 weeks in advance.
- Start with face to face presentations
- Direct referrals or letters signed by trusted community leaders or health care providers
- Seek out program champions
- Post announcements in newsletters, local calendars, local papers, radio, TV, under doors
- Develop a list of key media outlets including social media
Recruiting – Special Invitations

- Those with hearing limitations
- People with mild cognitive problems
- Partners and care givers
- Those without phones
Recruitment by Health Care Providers

- Letters sent by health care providers have high response rate

- A reminder in the electronic record can cue health care providers to refer patients

- Health care providers could download or handout pre-printed referral information to give to patients
Recruiting by Workshop Participants

- Past participants can be a great recruiting resource
  - Get multi-media release for all participants
  - Document testimonials continuously
    - Written
    - Audio-Visual

- New recruits can be encouraged to invite their friends, partners and/or caregivers

“We had experienced, or learned different parts of this program before, but no part alone was life changing. But with this program structure, I am a different person than I was just 6 weeks ago!”

MDC in Goodyear, AZ
The more personal your publicity & contact, the more effective.

Use multiple modes of publicity.

Once you have contact information, use it!
Retaining Workshop Participants

BUILD GROUP COHESION
REWARD ATTENDANCE
KEY TO SUCCESS IS GREAT LEADERSHIP
Participant Retention

- Start with Session 0
- Stay in touch
  - Call the day before the 1st session
  - Call if they do not show up
  - Call dropped out participants
- Place drop outs on wait list for future workshops
- Help others stay in touch
Building group cohesion

- Location should be private, comfortable, and convenient
- Provide transportation if needed
- Create a safe space
  - Participants should feel free to share without fear
- Encourage partnering
- Monitor discussion flow
Reward Attendance

- Keep content & process of workshop rich and dynamic
- Good food always welcome
- Lottery/ Raffle tickets a big hit for some
- Other treats are well received
Retention of Participants

• Leader selection is key!
• They must:
  ○ be well prepared
  ○ convey warmth and enthusiasm
  ○ be able to present material in a clear engaged manner
Recruitment of Facilitators

“LEADERS ARE SPECIAL”
Expected Skills for Leaders

1. Adheres to Curriculum
2. Facilitates group contributions
3. Handles difficult group dynamics and problem participants effectively
4. Speaks Comfortably in front of a group
5. Does not judge people and actions
6. Models activities appropriately
7. Sticks to time/agendas
8. Is willing to complete required pre-requisites
9. Listens and incorporates feedback from Master Trainers
10. Works cooperatively with co-leader
Breaking it Down

- Literate
  - With Feeling
  - Do they get the point across
- Time to prepare
- Works well with others
- “It’s not about me”
- Fits in with the community
- Able to self-evaluate
- Role-Model
Where to Find Leaders

- Meetings, church, friends
- Support groups
- Post on your agency website
- Announce in newspaper, newsletters ...
- Radio PSA, internet
- Social media
- Volunteer groups
- Workshops
• Schedule an interview
• Provide written information
• Contact information
• Recommendations
• Licensing
• Follow your gut
• This is a peer-led program
  ○ We aren’t looking for perfection
Red Flags

- Too Busy
- Too focused on their disease
- Those with an agenda
- Overachievers
- Too sick to facilitate
- Judgmental
- Cannot remove “professional hat”
Retention of Facilitators
It Starts with Selection

- Why be a facilitator?
  - Different reasons
- Set expectations
  - Number of workshops
  - Maintaining facilitator status
- Participating in a workshop prior to training
Retaining Facilitators

- Regular communication
  - Emails, phone calls
- Show appreciation
  - Thank you cards
  - Lunches
  - Stipends
- Annual meetings/celebrations
- Opportunities to facilitate
- Mentor
Connecting with other Facilitators

- Make sure facilitators have a connection with the institute
  - Begins after training
  - May require follow up by coordinators and mentors
  - Partner log-in, email blasts

- Webinars, updates, revisions, new research, newsletters...

- Invite them to participate in local planning

- What if a facilitator moves?
In Summary

- Think strategically
- Have a plan
- Consider time, scheduling, location, and systems
- Chose facilitator candidates carefully
- Nurture, encourage, and reward strong facilitators
- Stay connected
Resources

- Arizona Living Well Institute Website has a wealth of materials including PR documents that can be customized
  - www.azlwi.org

- Stanford resources including manuals and toolkits also available at the AZLWI website
  - patienteducation.stanford.edu

- NCOA has wealth of CDSMP content
  - www.ncoa.org/improve-health/center-for-healthy-aging
  - www.restartliving.org
Questions?
Contact the Institute

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