

Chronic Disease Self-Management Program Leader Refresher Workshop

Participant Recruitment and Referral Tips

Tips for Recruiting Participants:

- Start early! Begin recruiting at least 8 weeks prior to the start of your workshop
- Keep a database of sources for publicity. This can allow you to quickly distribute publicity. Some examples of publicity sources are:
 - Community organizations (e.g., churches, senior centers, YMCAs, home health agencies, voluntary health agencies)
 - Mass Media (e.g. radio stations, talk radio, television stations, websites, craigslist)
 - Newspapers (e.g., large dailies, small weeklies, online)
 - Community education calendars and quarterly newsletters
 - Employer programs (e.g., worksite wellness, employee list-serv, break-room bulletin boards)
- Use multiple modes of publicity; typically, the more the better. The more personal your publicity and contact, the more effective. Here are a few examples of publicity types:
 - Make a flyer each time a workshop is offered; post or send flyer to same locations (flyers alone will not fill a workshop)
 - In the community (e.g., store windows/doors, bulletin boards, residential complex doors)
 - Stuffed in bags/mailings (e.g., grocery bags, pharmacy bags, utility bills)
 - In health practitioner offices (e.g., exam room doors, waiting rooms)
 - Announcements at and presentations to community organizations (e.g., senior centers, public events, support groups in hospitals and your community)
 - One-on-one discussions (e.g., in an elevator, in line at the store, with a friend)
 - Emails to professionals in your community
 - Websites (e.g., church, senior center, other community organizations)
 - Program Alumni (can pass out flyers to family/friends or post in the community)
 - Other self-management education participants for program cross-referral
- Connect early and politely with participants. Use these tips to do so:
 - Answer your phone when called or respond quickly if a message is left
 - Hand or mail a reminder card to participants as they register
 - Follow-up with individuals who show interest in the course
 - Host a zero session to provide more information about the course
 - Call participants the week before the workshop begins to welcome them
 - Inform and invite new clients about the course
 - Invite an individual multiple times to participate in workshops

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Tips for Soliciting Health Care Practitioner Referrals:

- Find a health care practitioner (e.g., nurse, physician, physical therapist) who knows about the program or is willing to support it and will share information with other practitioners
- Have a health care practitioner or their organization send an informational letter about the program to their patients/clients. Keep in mind approximately 10% of letter recipients will actually enroll
- Utilize care managers or social workers for health clinics and hospital Emergency Departments to provide information (flyer/brochure) to “frequent fliers” with chronic conditions
- Talk to health care practitioners in specialties who work primarily with individuals with chronic conditions (e.g., pulmonary medicine, rheumatology, cardiology, mental health)
- Get support from health specialty committees, especially those focused on chronic disease management
- Send emails to your personal health care practitioners who you have an established relationship with and who may have seen program value
- Track program referrals and call to thank health care practitioners for frequent referrals

Tips for Retaining Program Participants:

- Follow-up with program participants after the first workshop session
- Create a welcoming environment in your workshop
- Maintain the fidelity of the program by sticking to the script
- Follow-up with participants on questions they have to which you may not readily know the answer
- Work with participants to help them secure local or public transportation to a workshop
- Hold a workshop at the location where you are targeting a specific audience (e.g., a health care clinic, a senior center, a worksite)

Thanks to the National Council on Aging and the North Carolina Division of Aging and Adult Services for several of the recruitment and retention tips listed here.