

Field Interviewer Hiring and Training

Lessons from the
BC Healthy Connections Project

October 2020



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for the BC Healthy Connections Project Scientific Team

We celebrate the Indigenous Peoples on whose traditional territories we are all privileged to live and work.

Citing This Manual

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We are deeply grateful to our Study Team members,
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BC Healthy Connections Project

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Glossary and Abbreviations

| | |
|-------|--|
| BC | British Columbia |
| BCHCP | British Columbia Healthy Connections Project |
| CHPC | Children’s Health Policy Centre |
| NFP | Nurse-Family Partnership |
| OP | Operating Procedures |
| RCT | Randomized Controlled Trial |
| SFI | Scientific Field Interviewer |
| SFU | Simon Fraser University |



Preamble

The British Columbia Healthy Connections Project

The BC Healthy Connections Project (BCHCP) is a randomized controlled trial (RCT) examining the effectiveness of the Nurse-Family Partnership (NFP) program. NFP involves nurses visiting young, disadvantaged mothers in their homes, providing intensive supports starting early in the first pregnancy and continuing until children reach their second birthday.¹ The aim of the BCHCP is to evaluate NFP's effectiveness compared with BC's existing health and social services in improving child and maternal outcomes. The project is led by a research team based at the Children's Health Policy Centre (CHPC) in the Faculty of Health Sciences at Simon Fraser University (SFU) in Vancouver, British Columbia (BC) — with collaborators at McMaster University, the University of British Columbia, the University of Victoria and the Public Health Agency of Canada. The first Canadian evaluation of NFP's effectiveness, this RCT is running from 2011 to 2022 with 739 mothers and 731 children enrolled. This trial is embedded within BC's public health and child health systems, involving close collaborations with the BC Ministries of Health, Children and Family Development and Mental Health and Addictions, and with four regional BC Health Authorities — Fraser, Interior, Island and Vancouver Coastal Health. The BCHCP also involves two adjunctive studies: a nursing process evaluation and an evaluation of NFP's impact on biological markers of maternal and child stress in a sub-sample of RCT families.^{2,3} The trial was registered on August 24, 2012 with ClinicalTrials.gov (Identifier: NCT01672060) prior to study enrolment commencing; the trial also has research ethics approvals from 10 participating agencies and universities. For a full description of the trial, methods and procedures, see the published RCT study protocol.⁴

Scope of BCHCP RCT Data Collection

Eligible and consenting participants living in the four participating Health Authorities were recruited in early pregnancy (i.e., prior to 28 weeks gestation), between October 2013 and December 2016. Participants completed the baseline interview and were then randomly assigned to the intervention group (NFP plus existing services) or the comparison group (existing services only). Research interviews were conducted until late 2019 and involved multiple methods and sources including:

- maternal self-report questionnaires administered in the home or by telephone
- child and maternal observational and cognitive tests in the home

Administrative public health data collection is ongoing until late 2020 to inform findings on the RCT’s primary outcome indicator — childhood injuries.

BCHCP Primary Outcome Indicator

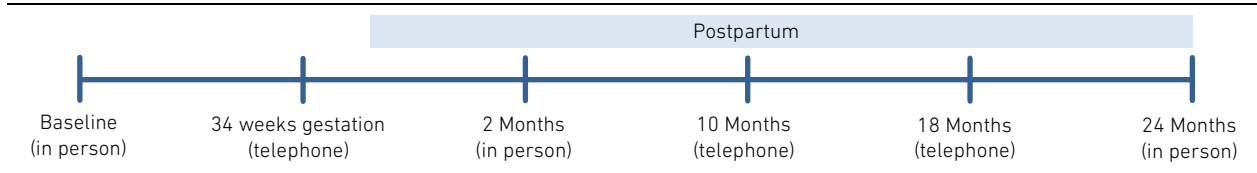
- Childhood injuries by age two years

BCHCP Secondary Outcome Indicators

- Prenatal substance use
- Child mental health at age two years
- Cognitive and language development at age two years
- Maternal subsequent pregnancies at 24-months postpartum

The SFU Study Team (or Study Team) includes Scientific Team members (Nominated Principal Investigator, BCHCP Scientific Director), onsite Study Team members and Scientific Field Interviewers (SFIs). The onsite Study Team continues to collect administrative and participant-tracking data, while SFIs have collected all interview data. (NFP home visits were separate and were the responsibility of the Health Authorities.) SFIs were located in the four Health Authorities and were masked to treatment group allocation. NFP nurses and participants were not masked. Participants were invited to participate in six interviews during pregnancy and postpartum (see Table 1 below):

Table 1. BC Healthy Connections Project Timeline



Between 2013–2019, the SFU Study Team tracked 739 participants to schedule in-person and telephone data collection interviews. Almost 4,000 interviews were completed across wide geographical areas and with participants who were experiencing extremes of socioeconomic disadvantage. For example, the data collected during the baseline interview confirm that we reached a cohort experiencing low income (84% reporting less than \$20,000/annum), as well as associated adversities including: unstable housing (52%), intimate partner violence (50%) and severe anxiety or depression (47%), with many (70%) experiencing cumulative disadvantage (i.e., four or more indicators of adversity).⁵

1. Scientific Field Interviewer Hiring

1.1 SFI Recruitment

SFIs typically hold a Bachelor's or Master's degree and have excellent communication skills along with some research experience. They do not necessarily have clinical training. This document, and others, have been prepared to help SFIs learn to conduct research interviews in the homes of pregnant girls, young women and new mothers and their children. Before beginning training or work, all research staff receive a general orientation to the RCT and its aims. As well, all staff sign CHPC confidentiality agreements, complete the Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans (TCPS 2) Course in Research Ethics (CORE)⁶ tutorial, and present evidence of a recent criminal records check to permit home-based research interviews.

1.2 SFI Training Overview

Training materials are designed to be self-guided under the supervision of trainers (experienced team members) for support and feedback. Senior Study Team members also closely supervise all SFIs and provide them with regular performance reviews as per CHPC policies. The intent is to ensure rigorous RCT data collection while forming and sustaining strong connections with participants — while also ensuring that Study Team members are safe and supported in doing this important work.

The following sections provide an example of a self-directed training plan that would be given to new SFIs. This demonstrates how a plan can be organized and how self-study and practice sessions are used to consolidate interviewer learning throughout complex areas (e.g., data coding, participant retention, etc.). Please note that the resources listed in each section are for demonstration purposes only. Those included in this manual are indicated with a link to the appendix.

There are references to the web program REDCap (Research Electronic Data Capture) throughout the training plan.⁷ The BCHCP uses REDCap for two separate trial functions: (1) participant tracking and (2) survey data collection.

2. Scientific Field Interviewer Training Plan

2.1 Introduction

Welcome to the BC Healthy Connections Project!

Below we have organized your training into several sections. For each section, a goal is noted. To assist you in achieving the goals, we describe relevant resources which can be found on the CHPC secure server. The training plan covers a large amount of information and is designed to help you thoroughly learn one area before moving on to the next. Note there will be practice sessions throughout the training plan.

As an adult learner, you are accountable for completing your training plan efficiently and for learning the requisite materials thoroughly. Please ensure you are confident in your mastery of each section prior to moving on. Highlight each item as you complete it so we may track your progress and provide support.

You are responsible for updating your training calendar so that it always shows your forecasted schedule. You are also in charge of contacting available trainers, (i.e., experienced Study Team members including other SFIs), to ask questions, submit completed exercises or schedule practice sessions. Let us know if you need more information or more opportunities for practice in any area.

2.2 Administrative Tasks

Goals

- Learn the job expectations for SFIs
- Process the required paperwork to perform your role
- Learn how to set up your email and calendar

Resources

- New SFI Orientation (includes Researcher Agreement)
- HR Guidelines for Salaried SFIs
- SFI Data Security Responsibilities

Instructions

- Read through the resource documents

2.3 BCHCP Purpose, Study Design and Outcome Indicators

Goals

- Learn the purpose and design of the BCHCP RCT
- Become familiar with the primary and secondary outcome indicators so you can think critically and make appropriate decisions to accurately capture and report required data

Resources

- BCHCP Study Protocol
- BCHCP Background

Instructions

- Read through the resource documents

2.4 Participant Informed Consent

Goals

- Develop a sound understanding of the BCHCP Consent Form content
- Demonstrate the ability to explain all aspects of the study using simple language
- Consider potential participant questions and where you can obtain the necessary information to answer these questions

Resources

- Participant Informed Consent Form for Randomized Controlled Trial
- Study Timeline Diagrams

Instructions

- Read through the resource documents
- Complete the Written Informed Consent Practice

Written Informed Consent Practice

Practice Objectives

- Present the contents of the Participant Informed Consent Form, highlight key messages and respond to participant concerns and questions
- Explain and monitor data entry on Consent Form signature page so the information is filled out to standard

Steps

- Arrange a practice session with your trainer

Trainer Notes: Please provide feedback throughout the practice session and continue until the trainee has shown they can competently complete the Written Informed Consent process.

2.5 REDCap Participant Tracking

Goals

- To understand how to use the participant tracking system in our customized REDCap database including: recording all nature, type and frequency of contacts with participants before and after interviews and checking/entering all identifying information at each interview

Resources

- REDCap Participant Tracking Tips & Tricks
- Participant Contact Data Entry Rules
- SFI REDCap Quality Control Feedback Log. This log serves to support SFIs in the use of the participant tracking system. You are responsible for checking and signing off on the feedback that you receive from the Study Team

Instructions

- Read through the resource documents
- Please sign into REDCap
- Watch the two introductory REDCap videos (20 minutes)

2.6 Participant Retention: Part I

Goals

- To master the ability to retain a large caseload of participants over 2.5 years through strong interpersonal skills and effective case management

Resources

- Retention Strategies Summary (Appendix 1)
- Interview Contact and Retention Scripts
- Participant Retention Example Scenarios, e.g., living in a shelter with limited phone access (Appendix 2)
- Interview Forecasting/SFI Calendar Interview Forecasting

Instructions

- Read through the resource documents
- Complete the Participant Retention Practice I

Participant Retention Practice I

Practice Objectives

- Learn to communicate with participants in a way that is likely to re-engage and retain them
- Learn to log participant communications with high attention to detail

Steps

- Review participant tracking data for pilot participant ID 5551
- Compose an email to establish contact and re-engage them with the study
- Send the email to your trainer as though she were the participant
- Proceed as though you have not heard back and attempt contact by other means available
- Schedule a 24-month interview in the participant tracking system and shared calendar
- Log all contact attempts in the participant tracking system as you would for a real participant
- Schedule a time to review your work with your trainer

2.7 Service Access and Use

Goals

- Learn to administer the Service Access and Use component of the questionnaire with confidence and high attention to detail
- Demonstrate ease of use with prompt cards and complex survey items
- Demonstrate understanding of required data, essential services, and the differences between categories of services and associated costs
- Learn to record detailed notes for unusual or ambiguous services and their associated costs

Resources

- Service Use OP

Instructions

- Read through the resource documents
- Complete the Service Access and Use practice

Service Access and Use Practice

Objectives

- Smoothly administer Service Access and Use following correct skip logic and cost codes

Steps

- Practice administering Service Access and Use on your own
- Arrange a practice session with your trainer
- After first practice, work independently to incorporate feedback from your trainer
- When ready, arrange a second practice session

Trainer Notes: During the first practice session please give immediate feedback throughout and prompt the trainee to ask further questions as required until their administration is competent.

Use your experience in the field to guide you in acting as a typical participant. It is important that the trainee has practiced sufficiently before embarking on the second pilot which should be more complicated than the first.

2.8 24-Month Questionnaire

Goals

- Demonstrate the ability to smoothly and accurately execute the 24-month questionnaire
- Follow participant tracking/reminder procedures including changes in mother-child circumstances that affect data collection

Resources

- 24-Month Interview Administrative OP (e.g., Tracking, Contact Schedule)
- 24-Month Interview Outline and Checklist
- Change in Mother-Child Circumstances OP

Instructions

- Read through the resource documents

2.9 Home Interviews

Goals

- To learn what is required during each step of the home-interview process

Resources

- Home Interviews OP
- Data Collection Guidelines
- Questionnaire Data Quality Guidelines
- Target Interview Dates and Parameters OP
- Contact Schedule OP
- Participants Without Access to a Phone OP

Instructions

- Read through the resource documents

2.10 Conducting a 24-Month Home Interview

Goals

- Demonstrate the ability to smoothly and accurately execute 24-month home interview
- Follow participant tracking/reminder procedures including changes in mother-child circumstances that affect data collection

Resources

- 24-Month Interview Administrative OP (e.g., Tracking, Contact Schedule)
- 24-Month Interview Outline and Checklist
- Change in Mother-Child Circumstances OP

Instructions

- Read through the resource documents

2.11 Full 24-Month Interview Administration

Goals

- To learn appropriate administrative procedures
- To demonstrate the ability to expertly conduct the complete 24-month home interview from start to finish (e.g., smooth equipment set up, submission of completed questionnaire with all necessary notes/observations, all applicable communications, and REDCap participant and administrative data entry) as you would for a real-life participant

Resources

- Timesheet OP
- Gift Card Distribution OP
- Vacation Coverage OP
- Mileage and Expense Reporting OP

Instructions

- Read through the resource documents
- Complete the Full 24-Month Interview Practice

Full 24-Month Interview Practice

Objectives

- Smoothly and accurately conduct a full interview from start to finish as you would for a real participant — without “breaking character”

Steps

- Arrange a pilot session with your trainer
- Ensure you are prepared with all resources (e.g. interview outline, answer sheets, etc.)
- Direct all communications and documents (including the questionnaire) to your trainer
- Email your trainer with reflections on what you did well and where you could improve

Trainer Notes: Please videotape the practice and provide the video to the Research Coordinator. Give the trainee (cc: Research Coordinator) a written summary of feedback on their administration and REDCap usage by the next business day. If needed, schedule another practice session with the trainee.

2.12 Participant Retention: Part II

Goals

- To master the ability to retain participants through strong interpersonal abilities and strategies and through effective case management

Resources

- Retention Strategies Summary (Appendix 1)
- Participant Retention Example Scenarios (Appendix 2)
- Retention Scripts
- Withdrawal Request OP
- Role-Play Audio Records/Need to Reach OP and Role-Play
- Participant Re-engagement Package

Instructions

- Read through the resource documents
- Contact your trainer and arrange a meeting to role-play two retention scenarios

2.13 Safety and Risk Mitigation

Goals

- To develop a comprehensive understanding of how to appropriately:
 - Mitigate participant and SFI risk
 - Report adverse events and unique situations
 - Act on knowledge of child abuse or neglect
 - Handle changes to participants' information and situations
 - Understand how to report these events and file the appropriate forms

Resources

- Adverse Events and Risk Mitigation OP
- The BC Handbook for Action on Child Abuse and Neglect
- Risk Mitigation Report Form
- Serious Adverse Event Report Form
- Child Abuse or Neglect Report Form
- Participant Change of Status and Safety competency exercises
- Risk Mitigation competency exercises

Instructions

- Read through the resource documents
- Complete the Participant Change of Status and Safety and Risk Mitigation competency exercises and submit to your trainer for feedback
- Organize a meeting with the Research Coordinator to review these procedures

2.14 SFI Wellbeing

Goals

- To receive support in managing unique participant situations and in maintaining healthy work-life balance and wellbeing

Resources

- BCHCP Staff Support Resources (Appendix 3)
- SFI self-care sessions
- SFI self-care strategies
- Bi-monthly teleconference meetings: these are optional self-care sessions with the SFI team, led by the Research Coordinator, providing SFIs with a safe space to discuss any challenges they may encounter in the field

Instructions

- Read through the resource documents



Acknowledgements

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Appendix 1: Retention Strategies Summary

| Approach | | Examples |
|------------------------------|---|--|
| Flexibility | Evenings and Weekends | <ul style="list-style-type: none"> ▪ Remind participant of SFI flexibility ▪ Contact participant at different times of day and on different days of the week, including weekends |
| | Tailor approach to participant | <ul style="list-style-type: none"> ▪ Adapt check-ins to participant's preference, (some prefer additional reminders or touch-base texts/calls and some prefer less contact) |
| | Team approach | <ul style="list-style-type: none"> ▪ Schedule interviews with other SFIs (working with team members to accommodate participant schedule) <ul style="list-style-type: none"> • Message to participant that we want to make sure this works for her — draw from other team members to accommodate her ▪ Ask another SFI to call the participant from their different work cell phone — shown to be successful after months of no contact |
| Not giving up | Do not take it personally | <ul style="list-style-type: none"> ▪ Our participants have busy and often chaotic lives. If they are not answering or hard to get hold of, do not assume it is because of you or because they don't want to participate. Many inform us that they appreciate the effort you are putting in — that we are not giving up on them |
| | Use differing modes of contact | <ul style="list-style-type: none"> ▪ Text first, letting the participant know you are going to call, then call and leave a friendly message if they don't answer ▪ Personalize the next contact: <ul style="list-style-type: none"> • e.g., "Maybe you got my message from last week..." ▪ Call first to ensure the phone is in service before sending a text |
| | Seize the Day | <ul style="list-style-type: none"> ▪ See if you can make an interview happen as soon as the opportunity presents itself even if that means involving another SFI who is available when you are not ▪ Offer a limited variety of options when you are available: <ul style="list-style-type: none"> • e.g., "I can do __, __ or __ day, does one of those work for you?" ▪ If this doesn't work, move to a flexibility strategy: <ul style="list-style-type: none"> • e.g., "Let me know what works for you, evenings and weekends are also fine, and I will do everything I can to make it happen." |
| | Use alternate contacts | <ul style="list-style-type: none"> ▪ Try texting/calling an alternate contact (previously provided by participant) or call and follow up with a text |
| Personalizing connection | Show appreciation Demonstrate interest | <ul style="list-style-type: none"> ▪ Communicate appreciation for their time, participation and commitment ▪ Show the participant you are interested; take notes so you can reference them during interactions: <ul style="list-style-type: none"> • e.g., "I still remember your puppy, Odin. How is he?" • e.g., "It was so nice to get to speak with you back in <u>[time]</u>." |
| | Display empathy | <ul style="list-style-type: none"> ▪ Acknowledge and sympathize with what they may be going through: <ul style="list-style-type: none"> • e.g., "It sounds like you're really busy right now." |
| | Keep it real | <ul style="list-style-type: none"> ▪ Have informal contact, no mention of interview: <ul style="list-style-type: none"> • e.g., "Hi, I haven't heard from you in a while! How are you doing?" |
| | Personalize scripts | <ul style="list-style-type: none"> ▪ For texts or emails: use "!" or "😊" where appropriate ▪ Let participant know that you are looking forward to connecting with her ▪ Vary messaging so that you don't sound scripted |
| Refreshing Motivation | <ul style="list-style-type: none"> ▪ Try to connect to their initial excitement and motivation: <ul style="list-style-type: none"> • Look through field notes and baseline interview notes for details on why they joined the study • e.g., "I'm so happy you're with us. What made you decide to join the project in the first place?" ▪ Remind them of the importance of hearing their voice through their participation in the surveys/research interviews: <ul style="list-style-type: none"> • It may feel like you're saying it a lot, but remember that each participant is hearing it only a few times | |
| Keeping participant informed | <ul style="list-style-type: none"> ▪ Mail re-engagement package, including re-engagement letter, study update, etc. ▪ Send Study Update text or email with current details about study ▪ Inform them of your contact plans: <ul style="list-style-type: none"> • e.g., "You appear to be quite busy right now, let's just skip this interview and I'll contact you in a month about setting up the next one." | |
| Project Management | <ul style="list-style-type: none"> ▪ Spot check: quality check your rescheduling attempt plan (no one is perfect) ▪ Be especially organized with participant contact schedules ▪ Take good notes so that you can refer to them to personalize your connection with participants | |

Appendix 2: Participant Retention Example Scenarios

For each scenario consider the following questions before reading the strategies recorded below:

- How can you gauge this participant's level of engagement?
- What are the (potential) obstacles?
- What strategies would you use to retain or re-engage her?

Example 1: Your participant lives in a shelter and can speak on the phone only when they call out from the shelter phone line. You have been in contact via text over her text-only app. They have rescheduled the 24-month telephone interview six times, but always fail to call when it is time for the interview.

Engagement

- Number of reschedules is high — they are engaging in rescheduling
- They have made it to the last of six interviews over 2.5 years
- They have a difficult life situation and likely have many challenges they are managing, but they are still in contact with the team and open to participating in the interview

Obstacles

- Participant has to initiate phone calls
- There is no opportunity for SFIs to utilize phone calls or voicemail (personal voice contact)
- Consider how comfortable or accessible the phone may be at the shelter. It may be in a public area where she is not comfortable making calls. It could be that the phone is often in use and she doesn't know when it will be free. It might be problematic for her to occupy the phone longer, e.g., for a full phone interview
- The participant may have trouble accessing the response cards (mailed printouts of the survey answer options)

Strategies

- Explore options for texting reminders on day-of interview/10-minutes-before reminders
- Try to set up short call with participant to discuss options. It can be helpful to understand barriers/nice for the participant to hear your voice
- Brainstorm options for phone call — different times of day/different phones (potentially in a staff office, more private area), Skype on a computer or phone, Gmail calling, borrow someone's phone
- Could interview be done in-person?
- Ask about scheduling the phone interview over two calls, so the calls are shorter
- Find out if she will be visiting a friend or family member where they can use a phone or computer
- If schedule allows on day of interview, offer a wider range of times, rather than a firm start time, e.g., instead of a firm 1 pm start, say you are available between 1–4 pm and ask them to call when they are free

Example 2: Your participant cancels the 10-month interview because they lost custody of their child and are "going through a hard time." They expressed gratitude when you offered understanding and reassurance that they can still make a meaningful contribution to the study. The participant then stopped responding to you, missed the 10-month interview, and has not been reachable to schedule the 18-month interview.

Engagement

- Some level of engagement at the 10-month interview — seeds of engagement were there
- Expressed her appreciation, so their feelings towards the study are likely positive

Obstacles

- Lost custody (move away from referencing the child until we know more about the circumstances)
- Participant is "going through a hard time," but we do not actually know what's happening for them right now and do not know how they are feeling
- Have lost communication with the participant: not sure if contact info is out-of-date or if they are not in a good place to take part

Strategies

- Establish a connection
 - Do informal check-ins to ask how they are doing
 - Reference contact history to see what has worked in the past or whether you can reference something from the past to build rapport
 - Try all contact modes — phone first then alternate contacts
- Once contact has been made
 - Let them know they can still contribute; we want to know about her experience
 - Get them in touch with their original motivation, reminding them it was important to them; we want to hear about and learn from their experience
 - Remind them how long they have been part of BCHCP, e.g., "You've been with the project since [Month] [Year]!"
 - Try to gently find out details of custody situation, so we know whether we will be offering a home or phone interview
 - Remind them we are interested in all experiences so we can make a difference for other people going through similar situations

Appendix 3: BCHCP Staff Support Resources

| Internal Resources | |
|-------------------------------------|--|
| Research Coordinator | The Research Coordinator has substantial experience as an SFI and is available to connect and to offer a safe place to talk |
| Human Resources Trainer | The BCHCP Human Resources Trainer is a certified clinical counselor, available to provide support for field- and work-related experiences |
| Senior BCHCP Team Members | The BCHCP Research Manager is available to connect people to supports as needed |
| Senior BCHCP Leadership | <p>Nicole Catherine, BCHCP Scientific Director and Co-Principal Investigator and SFU Mowafaghian University Research Associate, is an experienced trialist who knows the study population well and can provide further supports as needed</p> <p>Charlotte Waddell, BCHCP Nominated Co-Principal Investigator and SFU University Professor, is responsible for all BCHCP research staff and can also connect with SFIs as needed</p> |
| External Resources | |
| BC Crisis Line | Province wide toll-free line: 1-800-784-2433 |
| SFU Health and Counselling Services | Free services available to all SFU faculty, staff and students; office located in BCHCP headquarters building; accept drop-in/walk-in appointments; also available for SFIs who are offsite. Please contact your direct supervisor for more information |