

# HEALTHY START RECRUITMENT & RETENTION TOOLKIT

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*WITH SUPPORT FROM THE HEALTHY START EPIC CENTER*



Developed by JSI for the Healthy Start EPIC Center



*Supporting communities to  
give every child a Healthy Start.*

**Healthy Start EPIC Center**

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## I. INTRODUCTION

Healthy Start is a federal program dedicated to reducing disparities in maternal and infant health status in high risk communities. The program supports women and families before, during, and after pregnancy by addressing their health and social service needs, strengthening family resilience, and engaging community partners to enhance systems of care.

Recruitment – as it relates to Healthy Start - is the process of attracting and engaging women and children who might best benefit from the Healthy Start program, and also staff who are suited to help program participants achieve the Healthy Start program goals. Retention – as it relates to Healthy Start - refers to the efforts used to keep participants engaged until they've made progress towards achieving their personal goals, or until their children turn 2, as well as efforts to keep staff engaged, passionate, and capable of doing their best work for the Healthy Start program. Successful recruitment and retention strategies are integral to the success of a program; poor recruitment and retention can weaken the success of even the strongest Healthy Start programs. Programs cannot have the desired impact in their communities if the population they are trying to engage and the staff needed to do the engaging do not participate.

### PURPOSE OF THE HEALTHY START RECRUITMENT & RETENTION TOOLKIT

The Healthy Start Recruitment & Retention Toolkit is designed to provide Healthy Start program directors, managers, outreach and case management/care coordination staff with a framework, tips and tools for developing a comprehensive and effective approach to recruitment and retention. The Toolkit will help programs to:

- Assess the cultural competence of the team for recruiting and retaining participants
- Develop an outreach plan to achieve enrollment goals
- Develop a retention plan/strategy
- Utilize the principles of Continuous Quality Improvement to strengthen and sustain recruitment and retention efforts

This Toolkit includes tips and tools that can be customized to fit your program's unique recruitment needs and address outreach challenges. The tools can also enhance staff focus by providing the opportunity to self-reflect on what is working well and what needs to be modified to achieve outreach, recruitment and retention goals. The tools are organized into three sections:

- ▶ **Pre-Work Tools** include tools that focus on assessment activities to gain a better understanding of staff needs and assets. These tools provide perspective on your Healthy Start program and how it fits within your community's system of care, services and support.
- ▶ **Recruitment Tools** include planning tools that map out strategies for building relationships with community agencies, providers and organizations with which you plan to partner to best meet the needs of program participants, and who will be able to refer potential participants to your Healthy Start program. Educating community partners and potential participants with the most effective, tailored messaging will enhance efforts to reach the women, children, and families most in need of support.
- ▶ **Retention Tools** share a common theme of continuous quality improvement. Tools in this section focus on ensuring participants' social networks are identified and program systems are reviewed through strategies including participant and staff input. This section also encourages the celebration of joint successes and acknowledging community partner contributions, all of which create positive energy and goodwill.

## II. PRE-WORK TOOLS

Successful implementation of the recruitment and retention efforts begin with planning and pre-work. These activities will be the foundation for effective outreach and retention strategies. This section includes the following pre-work tools:

- [Taking a Pulse: Assessing Your Program's Cultural and Linguistic Competence](#)
- [Painting a Portrait: SWOT Analysis](#)
- [Measuring Your Baseline: Enrollment Metrics](#)

# TAKING A PULSE: Assessing Your Program's Cultural and Linguistic Competence

Successful recruitment and retention strategies rest on cultural sensitivity, flexibility and relationship building. For programs to be successful, they must know, respect and appreciate the community in which they are working, its assets and its challenges. Cultural sensitivity helps program staff navigate the complex and diverse nature of communities.<sup>1</sup> Here are some items for consideration when assessing your Healthy Start program's cultural competence in working with diverse families.<sup>2</sup> For the full assessment tool, visit the National Center for Cultural Competence, Georgetown University Center for Child and Human Development at <https://nccc.georgetown.edu/resources/assessments.html>

Ask yourself...on a scale of 0 to 4, how well/often does our Healthy Start program do the following...

- \_\_\_\_\_ Honors and respects families and youth of diverse cultures.
- \_\_\_\_\_ Recognizes the strengths, skills and resiliency of diverse families and youth.
- \_\_\_\_\_ Is committed to including persons from diverse communities in all aspects of our work.
- \_\_\_\_\_ Is committed to diversity in our Board, Leadership, Staffing and volunteers.
- \_\_\_\_\_ Keeps up-to-date on which population groups live in the area we serve and tracks any changes that take place.
- \_\_\_\_\_ Collects demographic data on race, ethnicity, language, and national origin of groups we serve.
- \_\_\_\_\_ Uses a process to review demographic data and identify groups not being served.
- \_\_\_\_\_ Identifies and works with natural networks of support in diverse communities to increase awareness and acceptance of services and supports we offer.
- \_\_\_\_\_ Builds relationships with diverse community leaders so that they know about and feel comfortable using the services and supports we offer.
- \_\_\_\_\_ Makes sure that diverse families and youth are part of our peer support network.
- \_\_\_\_\_ Takes culture and language into account when pairing families with peers.
- \_\_\_\_\_ Collects and organizes information about resources that exist within diverse communities.
- \_\_\_\_\_ Makes referrals to services and supports that take language and culture into account.
- \_\_\_\_\_ Conducts follow-up activities with families to determine their satisfaction with the information and referrals provided.
- \_\_\_\_\_ Advocates for systems and services and supports that are culturally and linguistically competent.

## CULTURAL AND LINGUISTIC COMPETENCE ASSESSMENT QUICK FACTS

### WHY?

- ▶ Ensures that staff acknowledge the importance of participants' cross-cultural experiences and lifestyles, and how these may impact participants' access to Healthy Start services.
- ▶ Encourages staff to be aware and inclusive of cultural and linguistic tenets in planning communications strategies for participants.

### HOW?

- ▶ Conduct a program cultural competence assessment to identify areas for improvement.
- ▶ Gather input from program participants to assess the degree to which the program is being culturally responsive to their needs.

<sup>1</sup>Goode, T. (2001). Policy brief 4: Engaging communities to realize the vision of one hundred percent access and zero health disparities: a culturally competent approach. Washington, D.C.: National Center for Cultural Competence, Georgetown University Child Development Center

<sup>2</sup>Goode, T., Jones, W., Jackson, V., Bronheim, S., Dunne, C., & Lorenzo- Hubert, I. (2010). Cultural and Linguistic Competence Family Organization Assessment Instrument. Washington, DC: National Center for Cultural Competence, Georgetown University Center for Child and Human Development

# PAINTING A PORTRAIT: SWOT Analysis

Before your staff can go out into the community and start building partnerships, your team must have an honest understanding of your own Healthy Start program as it sits within the community. By conducting a SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats), you can paint a meaningful self-portrait of your agency that will inform plans for hiring or training staff, creating new partnerships, and building your referral network.

## SWOT ANALYSIS QUICK FACTS

### WHY?

- ▶ A completed SWOT Analysis draws a self-portrait, giving a better perspective on where your program fits in the community.
- ▶ Becomes the basis for identifying potential referral partners, and appropriate messaging, as well as potential barriers and challenges.

### HOW?

- ▶ Include your whole team in the process for the most rounded perspective. And even better, invite two or three participants!
- ▶ Plan ahead! You may complete this all at once (2-3 hours), or split over several meetings.

SWOT ANALYSIS <sup>1</sup>		
	POSITIVES	NEGATIVES
<b>Internal Factors Impacting Recruitment &amp; Retention</b> <ul style="list-style-type: none"> <li>• <i>Human resources</i></li> <li>• <i>Physical resources</i></li> <li>• <i>Financial resources</i></li> <li>• <i>Infrastructure/capacity</i></li> <li>• <i>Activities and processes</i></li> <li>• <i>Past experiences</i></li> </ul>	<b>Strengths</b> <ul style="list-style-type: none"> <li>• What are our Healthy Start program's advantages and assets for engaging and retaining potential participants (in terms of people, physical resources, finances, capacity and infrastructure)?</li> <li>• Have changes in our organizational policies made something easier?</li> <li>• What do we do well? What activities or processes have met with success?</li> </ul>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>• Are there ways our Healthy Start program can improve our recruitment and retention efforts (in terms of people, physical resources, finances, capacity and infrastructure)?</li> <li>• What have we tried for recruiting participants that hasn't worked well?</li> </ul>
<b>External Factors Impacting Recruitment &amp; Retention</b> <ul style="list-style-type: none"> <li>• <i>Future trends - in our field or the culture</i></li> <li>• <i>Funding sources (foundations, donors, legislatures)</i></li> <li>• <i>Demographics</i></li> <li>• <i>The physical environment</i></li> <li>• <i>Legislation</i></li> <li>• <i>Local, national, or international events</i></li> </ul>	<b>Opportunities</b> <ul style="list-style-type: none"> <li>• What possibilities exist in the community to support /help our recruitment efforts ?</li> <li>• What are some reasons participants want to join our Healthy Start program?</li> <li>• What changes to local, state, or national policy might increase referrals or participants joining our program?</li> <li>• Are the cultures or demographics of our community changing in a way that makes our Healthy Start program more desirable?</li> <li>• Is a new funding source available?</li> <li>• Do changes in technology or service delivery models hold new promise?</li> <li>• Are there new types of jobs/roles in our program for workforce engagement?</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>• What obstacles do we face that hinder our recruitment efforts – what are the reasons programs may not refer participants?</li> <li>• What are some reasons participants may not want to join our Healthy Start program?</li> <li>• What changes to local, state, or national policy deter referrals or participants from joining our program?</li> <li>• Are the demographics or cultures of our community changing in a way that makes recruitment and retention harder?</li> <li>• Is the financial situation of a funder changing?</li> <li>• Have changes in our organizational policies made something more difficult?</li> <li>• Are changing technology or service delivery models threatening our effectiveness?</li> </ul>

<sup>1</sup> Adapted from University of Kansas' "Community Toolbox" <http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/swot-analysis/tools>



# MEASURING YOUR BASELINE: Enrollment Metrics

Actively displaying enrollment progress help staff see the status of prenatal versus interconceptional enrollment, and helps to keep your Healthy Start program’s vision and mission in sight. Find a way to update and display the enrollment numbers routinely (be creative – use interesting visuals, such as a thermometer or bar graphs). Celebrating success routinely helps to keep the staff engaged, motivated, and empowered to stay the course to achieve the program’s enrollment goals on an ongoing basis. Whether your team discusses the enrollment status week to week or monthly, ensure that this is an expected topic of conversation on a regular basis. Ask yourselves, what do these numbers tell us? What’s working? What’s not working?

While this sample table looks at referral sources as one measure, your program might also consider looking at your enrollment numbers by demographics (age, race/ethnicity, zip code). This may help you tailor your recruitment efforts or materials to certain groups of potential participants.

**PRO TIP!** As your team reviews these enrollment metrics, think about how long participants stay engaged with the program. Consider reviewing the various characteristics of participants who drop off after 3 months, 6 months, or one year, and those who complete the program.

ENROLLMENT METRICS					
	Baseline	During 2nd month of measurement	During 4th month of measurement	During 6th month of measurement	During 12th month of measurement
<b>Conversion rate -&gt; # enrollments/# of referrals</b>					
<i>Program Staff</i>					
<i>Hospital</i>					
<i>WIC office</i>					
<i>Health Center</i>					
<i>Other...</i>					
<b># Prenatal Women Enrollees by Source</b>					
<i>Program Staff</i>					
<i>Hospital</i>					
<i>WIC office</i>					
<i>Health Center</i>					
<i>Other...</i>					
<b># Pre/Interconception Enrollees by Source</b>					
<i>Program Staff</i>					
<i>Hospital</i>					
<i>WIC office</i>					
<i>Health Center</i>					
<i>Other...</i>					

## ENROLLMENT METRICS QUICK FACTS

### WHY?

- ▶ Helps track where program participants are coming from, and who they are.
- ▶ Identifies referral sources or potential participant groups that may need additional support, communication, relationship building to increase number of referrals.
- ▶ Allows the team to celebrate successes as they see the program participant numbers grow.

### HOW?

- ▶ Document which community partners are referring to your program and who they are referring.
- ▶ Document and track the number of participants by referral source and relevant demographics.
- ▶ Include your whole team in reviewing these numbers regularly so that everyone understands the strong referral sources and groups of participants who enroll and stay engaged in the program, and those that may need further nurturing.

### III. RECRUITMENT TOOLS

Recruitment tools included in this section will help prepare Healthy Start programs to create a road map for successful engagement of both participants and staff. By utilizing these tools, your Healthy Start program can be confident that your outreach plan will offer the most successful path to achieving your desired recruitment and retention goals. Tools included in this section are:

- [Find Your Starting Line: Working with Partners to Build a Referral Network](#)
- [Mapping Your Communication Roads: Engagement & Dissemination Planning](#)
- [Documenting Your Roadmap to Success: Creating Your Outreach Plan](#)
- [Making Your Pitch: Creating an Effective Elevator Speech](#)
- [Telling Your Healthy Start Story: Collecting Participant Testimonials](#)

# FIND YOUR STARTING LINE: Working with Partners to Build a Referral Network

## BUILDING A REFERRAL NETWORK QUICK FACTS

### WHY?

- Lays the groundwork for open, honest communication that will help partners anticipate potential challenges, and allow for quick adjustments, as necessary.

### HOW?

- Have the group select opportunities to begin addressing, and assign roles and expectations.
- Include a community member or potential program participant in these conversations!
- Review these issues with one partner, or several partners.

A planning tool, such as the “Find Your Starting Line” tool, helps your Healthy Start program to work with other community agencies, providers and organizations to consider and anticipate the obstacles you may face as you work together to strengthen your community’s referral network. Having these conversations early on in your partnership promotes openness among partners, and facilitates proactive planning to make the process of referring eligible participants to the most appropriate programs more streamlined. This kind of bottom-up planning empowers partners to take ownership in the referral network and strengthens relationships among partners.

<b>FIND YOUR STARTING LINE: Considering a Common Goal with Your Partners<sup>1</sup> (in this case Building a Referral Network)</b>		
<p>1. List some strategies our partnership may implement to help support coordinated, appropriate referrals to local agencies. For example:</p> <ul style="list-style-type: none"> <li>• <i>Co-location of services</i></li> <li>• <i>Single point-of-entry/referral form</i></li> <li>• <i>Data sharing</i></li> <li>• <i>Cross-training of staff</i></li> <li>• <i>Joint community education events</i></li> </ul>	<p>2. Name some assumptions individuals, organizations, and the larger community may have about the current referral systems (formal or informal) in our community. For example:</p> <ul style="list-style-type: none"> <li>• <i>Difficult, confusing</i></li> <li>• <i>Unfamiliarity of services</i></li> <li>• <i>Misconceptions about agency mission or beliefs</i></li> <li>• <i>Concerns about eligibility</i></li> </ul>	
<p>5. List the factors that influence the current referral systems (formal or informal) in our community. For example:</p> <ul style="list-style-type: none"> <li>• <i>Multiple hospital systems</i></li> <li>• <i>Lack of mental health and substance use services</i></li> <li>• <i>Agencies from border communities overlap services</i></li> <li>• <i>Multicultural community with varying needs and preferences for services and providers</i></li> </ul>	<p>6. Describe the referral system challenges our partnership will work to address. For example:</p> <ul style="list-style-type: none"> <li>• <i>Streamline application processes across agencies</i></li> <li>• <i>Improved communication</i></li> <li>• <i>Increased coordination of services and following through with referrals.</i></li> </ul>	<p>3. What are the desired results of our partnership’s approach to promoting a coordinated referral system? For example:</p> <ul style="list-style-type: none"> <li>• <i>Participants have access to right services, at the right time</i></li> <li>• <i>Staff know external resources available to participants</i></li> <li>• <i>Referrals are easy for participants to navigate.</i></li> </ul>
	<p>4. Describe why our community needs our partnership to work on a coordinated referral system. For example:</p> <ul style="list-style-type: none"> <li>• <i>Community members are “falling through the cracks”</i></li> <li>• <i>Poor health outcomes</i></li> <li>• <i>Disparities in access and use of services.</i></li> </ul>	

<sup>1</sup> Adapted from FSG. “Collaborating for a Common Agenda” tool: <http://www.fsg.org/events/collaborating-to-create-common-agenda>

# MAPPING YOUR COMMUNICATION ROADS: Engagement & Dissemination Planning

This planning tool will help your Healthy Start program think about how you utilize new partnerships to make sure your message is heard by the right people. This tool will help your team think about your partners' audiences, and consider the types of messages and materials that will best speak to those audiences. The information captured by this tool will also make up a large portion of a more comprehensive outreach plan.

Engagement & Dissemination Planning		
Partner (Examples)	Which target audience does this partner reach/represent?	What type of materials/methods are appropriate for these audiences
Social service organizations serving similar participants	Referral partner, potential participants	Print materials (flyers, posters), program giveaways, PPT presentation to tell staff/org leadership about your Healthy Start program, elevator speech
Local churches/faith centers	Referral partner, potential participants	Print materials (flyers, posters), program giveaways, PPT presentation for faith leaders/councils, elevator speech
Barbershops/salons	Program "ambassador", Potential participants	Print materials (flyers, posters), program giveaways, talking points to help barbers/stylists, elevator speech
High schools	Referral partner, potential participants	Print materials (flyers, posters), program giveaways, PPT presentation to tell staff/org leadership about your Healthy Start program, elevator speech
Local colleges/higher education	Potential staff, interns, volunteers	PPT presentation to tell staff/org leadership about your Healthy Start program, elevator speech
Local foundations, endowments, corporate giving programs	Funders	PPT presentation to tell staff/org leadership about your Healthy Start program, elevator speech, infographic demonstrating reach and impact
Local hospital systems	Referral partner, potential participants, potential funder	Print materials, program giveaways, PPT presentation to tell staff/org leadership about your Healthy Start program, elevator speech, infographic demonstrating reach and impact
Other?		

## ENGAGEMENT & DISSEMINATION PLANNING QUICK FACTS

### WHY?

- Understand the universe of partners and audiences who need to "hear" your Healthy Start program message.
- Builds an inventory of materials and tools you will need to tell your Healthy Start program story.

### HOW?

- Plan a meeting (1 ½ -2 hours) with your entire Healthy Start program team – including front line workers, program managers, and CAN staff.
- Have each person/team create a list of every category of "people" to whom they provide information or education. The more specific, the better!
- Encourage the team to include groups who they are NOT working with, but may want/need to in the coming year.
- Walk through each partner and fill in columns 2 and 3.

# DOCUMENTING YOUR ROADMAP TO SUCCESS:

## Creating Your Outreach Plan

Your outreach plan should be a living, breathing document inclusive of strategies that will promote your program with the ultimate goal of enrolling and retaining participants and program staff. Engaging your front line staff – especially your outreach workers - in this kind of planning and management is a great way to ensure your plan has input directly from the field. Every time a new staff person joins your team, they should be able to look at this plan and be clear on where they fit into helping promote your Healthy Start program and support referrals and enrollment. The table below includes a sample of activities.

GOAL: To enroll 1,000 women (including 500 pregnant women) in our Healthy Start Program by December 31.				
Overview: This Outreach Plan incorporates strategies and tools to effectively communicate the value of our Healthy Start program to community partners who may refer people to us and to community members who may benefit from the services our program provides.				
Outreach Strategy/Tool (Examples)	Responsible Person(s)	Intended Audience	Dissemination Method	Frequency
Review your dissemination plan to make sure you're incorporating all possible outreach and referral partners in your outreach efforts – consider recruitment of both participants AND staff.	Communications workgroup** see note below	Program staff	n/a	Review annually
Conduct discussion groups with participants to understand their preferred communications channels, messages, and useful giveaways.	Communications workgroup	Past, potential, and current participants	Invitations to participate posted in office, flyers handed out by CHW.	Every other year
Conduct discussion groups with staff to understand what motivates them and how your Healthy Start program can better support their work.	Project management team	Staff	Invitations sent via email and announced at staff meetings	Annually, at performance reviews.
Develop elevator speech(es) for HS program, conduct training for staff	All program staff, especially outreach staff	Potential participants, referral sources, funders	Community meetings, One-on-one conversations, etc.	Review annually
Develop/update print materials and standard presentation describing your Healthy Start Program. Make different versions to “speak” to different audiences.	Communications workgroup, front line staff, CAN members, participants	Potential participants, referral sources, funders, CAN members	Referral partners, HS Program staff, community meetings, other community locations.	Review annually
Add “How did you hear about us” question to intake/referral forms to understand how different outreach methods are performing.	Administration	Participants	At intake	One time
Identify and/or host community events each year to promote your HS program. Consider community baby showers, parenting groups, local festivals.	Project management team	Staff	n/a	Annually

### OUTREACH PLAN QUICK FACTS

#### WHY?

- ▶ Creates a clear “road map” for your team to understand who is using what messages where, and who is responsible for updating materials.
- ▶ Allows your Healthy Start program to adapt and update strategies as needed.
- ▶ Supports onboarding/orientation of new staff.

#### HOW?

- ▶ \*\*Convene a “Communications Workgroup” to lead or co-lead the process with any existing marketing/PR staff. Invite at least two program participants.
- ▶ Schedule a half-day meeting to develop Outreach Plan.
- ▶ Set aside time during each subsequent staff meeting for Outreach Plan updates and feedback.
- ▶ The more specific the better!

# MAKING YOUR PITCH: Creating an Effective Elevator Speech

An elevator speech is a brief, persuasive “pitch” that you use to spark interest in what your Healthy Start program does. A good elevator speech should last no longer than 20 to 30 seconds, hence the name. It should be interesting, memorable, and succinct. It also needs to explain what makes your Healthy Start program unique. Remember that you need to tailor your elevator speech to the needs and concerns of different audiences (e.g. one speech for potential participants, another for potential referral partners). Lastly, PRACTICE, PRACTICE, PRACTICE! Consider recording practice “runs” on your cell phone or video camera to look back on and make improvements.

For the purposes of this example, we are a Healthy Start program talking to a local high school with the highest drop-out rate in the city, trying to build a new referral relationship.

## 1. Describe your program

- Remember, keep your audience in mind. Is there any particular aspect of your program which might be more interesting or attractive to this audience?
- Discuss what community needs your program works to address.
- If possible, include a very brief (but memorable!) example of your program meeting one of these needs.

*The Elm Park Healthy Start Program is a community-based program working to support the health and well-being of our neighborhood's young women. My name is Jane Smith, and I'm one of the family service coordinators helping make the connections between our participants and the services they need. Those services range anywhere from getting them enrolled into GED classes, helping our girls take ownership of their reproductive health and future, and even engaging their partners in parenting classes. [Recently, we had a graduation celebration for a set of pregnant teens who completed our "Preparing for Baby" curriculum.]*

## 2. State what sets your program apart

- What is unique about the services your program provides?
- Is there a unique connection between your program and the audience?

*What makes our program different is our staff's close connection to the community and being able to help our participants connect the dots so that they can thrive not only as individuals, but also as parents. Given that quite a few of our community outreach workers have graduated from your school over the last ten years, we think we have a great opportunity to build some relationships with your school nurses and counselors who may be interested in sending at-risk students to our program.*

## 3. Make the connection

- Pose a question about how your audience operates, related to the service or program you're describing.
- By no mean should you ever close with a 'yes' or 'no' question. Keep them talking!

*What are some of the other services or programs you're referring students to?*

## ELEVATOR SPEECH QUICK FACTS

### WHY?

- Introduces your program to potential partners or participants.
- Serves as a flexible promotional tool that can be tailored for different audiences.

### HOW?

- Consider your audience and any special attributes which you may want to connect to in your speech.
- Figure out what you hope to gain at the end of your speech: Awareness of your program? Building a referral relationship?
- To help people remember your message, hand them a business card or other giveaway item from your program, with contact information.

# TELLING YOUR HEALTHY START STORY: Collecting Participant Testimonials

Success stories from participants and partners can be very effective recruitment tools. Participants actively engaged in your Healthy Start program may find it rewarding to share how the program helped to change their lives. Encouraging others to join the program can be exciting for some participants and can boost self-esteem—having participants share their story can help achieve this goal.

## PARTICIPANT TESTIMONIALS QUICK FACTS

### WHY?

- ▶ Stories can be an effective recruitment tool.
- ▶ Empowers program participants to tell their story and have others hear it.

### HOW?

- ▶ Actively look and listen for stories of change among your participants.
- ▶ To make them comfortable, ask participants to invite one or two loved ones to be part of the interview.
- ▶ Share participant stories at meetings, through publications and in the community to help raise awareness of and interest in your program among potential clients and partners.

Strategies for developing testimonials	Expert Tips
<ul style="list-style-type: none"> <li>• Actively look and listen for the stories of change and create the infrastructure to share those positive experiences to encourage others to give Healthy Start a try.</li> <li>• Ask participants if they would like to share a testimonial.</li> <li>• Obtain written consent from the participant to share their Healthy Start story. Ask for permission to use their story or quotes from their story in outreach materials, e-newsletters, website, Facebook.</li> <li>• Interview (possibly with audio or video recording) participants and/or write up their stories for them. Have them write it on a Healthy Start Success Sheet that is submitted for participant files, publications, sharing.</li> <li>• Ask participants how their lives were enhanced as a result of working with the Healthy Start Program and its' partners.</li> <li>• Invite participants to attend CAN meetings to share their stories.</li> <li>• Acknowledge and thank participants who help promote Healthy Start and refer potential participants.</li> </ul>	<p><i>Look for changes in participant excitement about the baby, or how they look forward to fulfilling their role as parent and explore if the participant would like to share their story.</i></p> <p><i>Participants who have been in the program for a while may experience an increase in their confidence levels and commitment to work on their goals.</i></p> <p><i>Participants may want to share how they have built new skills by receiving linkages to other programs like a referral for a job training program, or actually obtaining a job which helped them to take on new life challenges and experiences.</i></p>

## IV. RETENTION TOOLS

Although it is the last section in this toolkit, retention is certainly not the least important. Keeping participants engaged in the Healthy Start program can often be difficult work, as is retaining staff who face challenging, emotional work each day. Retaining staff and supporting the continuity of services is critical to keeping participants engaged in the program. And because of their importance, Healthy Start programs must be prepared to implement participant and staff retention strategies as soon as a participant or new staff person is connected to your program. This section includes several tools that will position your Healthy Start program to help your participants and staff reach their personal and professional goals. Those tools include:

- [Weaving a Safety Net: Documenting a Support Network](#)
- [Looking to the Future: Goal Setting](#)
- [Direct From the Source: Participant Interviews](#)
- [Direct From the Source: Staff Interviews](#)



# WEAVING A SAFETY NET: Documenting A Support Network

Immediately following enrollment, Healthy Start program staff should begin to document a participant’s support network. Most importantly, this list reminds participants of the supportive people around them – whether family, friend, pastor, or teacher – and might make them more likely to reach out for help when needed. And secondly, this documentation provides additional ways for your program staff to get in touch with the participant should they be out of touch for any given amount of time.

Documenting a Support Network			
Support Person’s Name	Support Person’s Relationship to Participant	Type(s) of Stressor they Could Help With	Phone / Email / Address
	<i>** Anyone whom the participant trusts to provide support in any manner. May include family, friends, neighbors, other case workers or service providers, etc.</i>	<i>** Examples of stressors include transportation, appointment-keeping, child care, parenting support, employment, housing, education, finance, nutrition, etc.</i>	<i>** Consider including the best way to reach the support person in time of stress or crisis.</i>

Source: Adapted from Johns Hopkins University, “Personal Support Network Checklist”

## SUPPORT NETWORK LIST QUICK FACTS

### WHY?

- ▶ When participants recognize there are people to support them – they are more likely to reach out for help.
- ▶ Gives program staff additional channels to reach the participant when there has been a lapse in communication or engagement.

### HOW?

- ▶ Immediately upon enrollment, collect contact names, and when possible, multiple modes of contact for those people.
- ▶ Consider asking for social media accounts/handles for both the participant and/or their support network as an additional method to connect. Ask permission to use those channels, in cases of emergency.

## LOOKING TO THE FUTURE: Goal Setting

Goal setting is a great strategy for engaging and empowering participants, and starts with your Healthy Start program staff having a conversation with the participant about their short and long-term goals. By writing down these goals with hopeful target dates, the participant will always have a documented positive goal to strive towards, and the program staff will always have something to discuss during each encounter. By revisiting and updating this goal plan on a regular basis, participants will be able to celebrate the list of successes that will continue to grow. This, in turn, helps to keep participants engaged in the program.

### GOAL SETTING QUICK FACTS

#### WHY?

- ▶ Helps clients identify their individual and program goals, which in turn clarifies priorities, hopes and dreams and allows staff to assist in coordination of services.
- ▶ Provides a value added service that supports clients with monitoring and tracking their progress, lessons learned, and identifying barriers and resources to address their concerns.
- ▶ Engages clients in achieving success that they can be proud of (training, certifications, employment)

#### HOW?

- ▶ Work with the client to identify their goals.
- ▶ Identify opportunities for Healthy Start staff to support the client in achieving their goals.

Goal Setting Worksheet	
Setting Goals	Goal Date
Something I want to accomplish in the next week:	
By our next visit:	
In the next month:	
In the next 6 months:	
In the next year:	
In the next three years:	
Supports and Strategies to Reach Goals	
How Healthy Start can support my goals:	
Other resources to support my goals:	
Steps I will need to achieve my goals:	
What can I begin doing tomorrow to work towards my goals:	
How often will I revisit my goals and make adjustments if necessary:	

# DIRECT FROM THE SOURCE: Participant Interviews

By asking participants about their experience with the Healthy Start program and assuring them the information will help make program improvements, Healthy Start programs give participants some ownership not only of their own path, but also of the program's path. These sample questions are an example of ways in which your staff can collect information about how your Healthy Start program is perceived by the families you serve. These questions can be tailored to fit the needs of your program.

1. **What is your overall level of satisfaction with the services and support Healthy Start has provided to you and your family?**
2. **What services provided by our Healthy Start program are helpful? What other ways could our Healthy Start program support you?**
3. **Do you plan to continue with the Healthy Start Program? Why, why not?**
4. **What could Healthy Start have done better to give you the best experience possible?**
5. **In what ways has your experience in our Healthy Start been different than you thought it would be?**
6. **Would you recommend our program to your family or friends? If yes, do you know someone who could benefit from our program? May I get their name and number?**
7. **What suggestions do you have for making our program and services work better for mothers, fathers and families?**
8. **To help us better deliver services, it helps to know why participants leave our program. Can you share what you have heard from friends or family about why they no longer participate in Healthy Start?**

## PARTICIPANT INTERVIEWS QUICK FACTS

### WHY?

- ▶ Collects important participant feedback that will contribute to the continuous quality improvement of your program activities.
- ▶ Supports retention by creating an opportunity for the participants to feel "heard" and building trust and ownership of their path in your Healthy Start program.
- ▶ Supports recruitment – if participants are happy and feel engaged, they'll be more likely to recommend the program.

### HOW?

- ▶ Involve program management, frontline staff, CHWs, and evaluators in finalizing interview questions, timeline, and process.
- ▶ In the visit prior to the interview, explain the process with the participant so they're comfortable and prepared to respond.
- ▶ Ask participants the questions in person and leave plenty of time for them to talk. It may be helpful to have the questions asked by a staff person who is not the participant's main contact with the program.

## STAFF INTERVIEWS QUICK FACTS

### WHY?

- ▶ Supports staff retention by creating an important opportunity for the staff to feel “heard”, build trust with program leadership, and feel supported in their own professional development.

### HOW?

- ▶ Involve program management, staff, and evaluators in finalizing interview questions and process for conducting interviews.
- ▶ Give staff a copy of the questions prior to their performance review to help them prepare.
- ▶ Ensure that supervisors follow up to provide the support requested by staff and address staff concerns.

## DIRECT FROM THE SOURCE: Staff Interviews

A program’s most valuable asset is its staff. An organization holds a great deal of responsibility for ensuring the most appropriate, qualified staff are hired and retained to provide participants the most authentic experience possible while engaged in the program. Longer tenure for staff is important for the staff/participant relationship where trust and familiarity are important to a participant’s sustained engagement in the program.

From the community outreach worker, the parenting coach, to the Program Director – each person on your team makes decisions – both personal, and professional – that impact the lives of the participants you serve. While your program may not have direct control or influence on all the conditions affecting your staff’s life, you do have an opportunity to provide support and encouragement in the workplace.

By asking staff how they see their career progressing, and taking an annual “pulse” on their job satisfaction, you are empowering them to have control over their destiny – parallel to the work they’re doing with your program participants! The more engaged and in control of their professional lives staff members feel, the more likely they are to feel invested in the program.

1. List 3 professional/career goals you have for the upcoming year.
2. How can the organization support and provide resources to further your career goals?
3. (If questionnaire was previously completed) How have you progressed on working towards the goals you set for yourself last year?
4. Do you believe you can achieve your full potential working for this program? Why, why not?
5. If given the chance, would you reapply for your current job? Why, why not?



*Supporting communities to  
give every child a Healthy Start.*

**Healthy Start EPIC Center**

# HEALTHY START RECRUITMENT & RETENTION TOOLKIT

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