

How to retain leaders and engage participants of self-management programs: Oregon Best Practices

This guidance was developed based on the experience of offering the Living Well program but it is also applicable to other self-management programs. The document summarizes guidance from *the Stanford University Implementation Manual, Living Well – A Guide to Implementation* by the Oregon Department of Human Services (2009) and input from the Oregon Self-Management Network Workgroup on Leader Engagement and Participant Access.

Participant Engagement

Participant engagement and retention is a very common issue that local programs must often work to address. Leaders and coordinators should remember that program participants often have one or more chronic conditions that may get in the way of an individual's ability to participate in every session. Retention refers to a participant's attendance of the program workshops that allows reaching positive health outcomes and meeting fidelity requirements for the program. However, it is not unusual for participants to drop out, thereby compromising the outcomes of the program if participation drops below ten people. It may affect the leaders' confidence if a large number of participants drop out mid-workshop.

Successful strategies for addressing participant retention in Oregon:

- Quarterly or semiannually, Coordinator holds a "pre-workshop" or "zero session" to share information about the program and emphasize the importance of commitment to attend as many sessions as possible, in order to achieve positive health impact. This opportunity can be used to introduce leaders, share testimonials of participants and sign-up for the program, and also to conduct participant pre-screening: to discuss readiness for the change, appropriateness of the program and time commitment.
- Coordinator/Program Assistant* reaches out to all registered participants by phone or sends a letter that should arrive a week before the workshop to remind them about the date and time of the first session and provide directions to the workshop location.
- One to three days before the workshop, Coordinator/Program Assistant* calls all registered participants to remind them that they are registered for the program, where they need to go and at what time.
- After the first session, Coordinator/Program Assistant* calls participants who attended the session to get their feedback and check-in about their action plans.
- After the first session, Coordinator/Program Assistant* calls participants who did not show up to the first session and invite them to attend the next session and remind them where to go and at what time.
- During the workshop, Leader encourages participants to spread the word about the program among their family and friends and invite them to participate.
- After the second session, Leader reports participation in sessions 1 and 2 to Coordinator/Program Assistant on the form that is provided with the Leader kit.
- During the workshop, Leader tracks attendance and, upon completing the program, reports attendance data to Coordinator in the manner established for the organization.
- At the end of the workshop, Coordinator/Programs Assistant may contact participants who dropped out to conduct a brief survey regarding reasons for not completing and advise them of the next opportunity to attend the program and see if they are interested and available to attend.
- At the end of the workshop, Coordinator sends a letter to participants who did not show up to any session. The letter includes a brief survey regarding the reasons for not participating in the workshop and an invitation to register for another program workshop, along with contact information for the program and a pre-addressed envelope with pre-paid postage.

*Depending on the site, Coordinator/Program Assistant can delegate this task to group leaders.

Leader Engagement and Retention

People decide to become leaders for their own unique reasons. The more you know about these reasons, the more you are able to help them meet their expectations. If someone wants to help people like themselves, they might be the right person to give talks to disease-specific organizations. If they need social contact, they might want to teach more workshops or do some extra work recruiting. If they are a student who needs a project, maybe you can have them evaluate some part of your program.

It is important to keep leaders active once they have received training. Trained leaders are pivotal to any successful self-management program and it is expensive and time-consuming to train new leaders.

Successful strategies for leader retention in Oregon:

The following skills and attributes are important for a quality leader:

- good communication and facilitation skills
 - being friendly and engaging
 - ability to work with a diverse group of people with a range of chronic conditions
 - dependability and punctuality
 - ability to follow a scripted curriculum
 - skills to manage difficult situations
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- When possible, offer an incentive or stipend for lay leaders to conduct workshops. Even a small token will help leaders feel appreciated for the service they provide.
 - Pair a newly trained leader with an experienced leader, so that the new leader feels more comfortable and can learn from the experienced leader.
 - Prior to the first session, Coordinator communicates with the leaders to assure that registration is complete and that there are no outstanding issues with the location, setup or group size.
 - Prior to the first session, Coordinator/Assistant packages all of the materials a leader will need for the entire workshop.
 - Host regular leader meetings for all trained leaders; partnering with other community organizations might be helpful. These meetings can include networking time, program updates, additional training and technical assistance and/or something to celebrate the leaders for the important work they do. When possible, provide lunch or other incentives to encourage attendance.
 - Send regular correspondence (a monthly email or a quarterly newsletter) to update all trained leaders about scheduling, upcoming workshops, and announce trainings and regional leader meeting dates/times.
 - If people decide they no longer wish to be leaders, find out why. Probe a little to find out if anything can be done for them to continue as a leader. Ask if they have any advice that will help to better engage and retain leaders.