

CDSME Pre-Program Survey Call Instructions (Online or tool Kit)

Before making the call

- Make sure you have the correct survey link for the corresponding workshop

Introductions

- Introduce yourself as the workshop facilitator, stating the name of the person who made their registration call if it was not you (i.e. You spoke last week with Allison and signed up for a Healthier Living workshop. My name is Mayte and I'll be facilitating that workshop.).
- Remind the participant of the workshop they signed up for (start date, time, schedule).
- Ask the participant if now is a good time to complete the pre-workshop survey. This call should take about 10-15 minutes of their time. (if not – when is a better time to call back?)

Complete the Survey

- Explain that before the program begins, we ask that they complete a survey that helps with reporting to funders. The information they provide remains confidential and will only be used in aggregate form (for example: 53% of workshop participants speak English at home or 95% of workshop participants are 60 and older).
- Read the pre-survey modified script:

This workshop is made possible by a grant from the U.S. Administration on Community Living (ACL) and Partners in Care Foundation. I'm about to begin a brief optional survey. Before we share your information with ACL and its database contractor, the National Council on Aging and Partners in Care Foundation, I want to explain how your information will be used and protected. Your information is very valuable to us. We use it to learn who is being reached by this program and to improve our services. It also helps our funding agencies and Congress show that they are spending their money wisely.

We do not share your personal information, including name, year of birth, zip code, and gender with anyone else. You may skip any questions that you do not want to answer. As I go through you can just let me know if a question comes up that you don't want to answer. While doing the Survey, you may ask me to explain any questions that you find confusing.

We follow very strict rules to protect all of your information and to keep it private. We will maintain this information securely following standard practices for protecting private data. Completing the Survey is entirely voluntary. If you decide not to complete the Survey you can still participate in this program. Are you ready to begin the survey?

- Complete the survey with them

Closing

- Thank the participant for completing the survey.
- Tell the participant that you'd like to call them next week to help get their device set up with the online platform the workshop will use.
- That call will take about 5-30 minutes of their time as well (for tool kits: 5-10 / for online: 15-30)
- Tell them what time to expect a call from you or ask when the best time to call back would be.

