



**HHMI GRANTEE IMPLEMENTATION EVALUATION:
MARKETING, RECRUITMENT AND RETENTION STRATEGIES**

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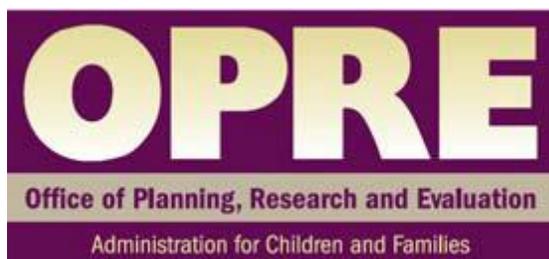
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HHMI GRANTEE IMPLEMENTATION EVALUATION: Marketing, Recruitment and Retention Strategies



Introduction

The Hispanic Healthy Marriage Initiative is a focused strategy to address the unique cultural, linguistic, demographic, and socioeconomic needs of a growing population of Hispanic children and families in the United States. The Administration for Children and Families (ACF) and the Office of the Assistant Secretary for Planning and Evaluation (ASPE), within the Department of Health and Human Services (HHS), funded the Hispanic Healthy Marriage Initiative (HHMI) Grantee Implementation Evaluation to learn how relationship and marriage education programs serving primarily Hispanic individuals and couples are marketing services and developing culturally appropriate materials and programming for diverse Hispanic populations. This study is an implementation evaluation, not an impact evaluation.

Approximately 48 million U.S. residents are Hispanic. The Hispanic Healthy Marriage Initiative Grantee Implementation Evaluation is examining ways in which federally-funded healthy marriage grantees have developed adapted and implemented culturally relevant and appropriate programs to strengthen Hispanic marital and family relationships. This brief, second in a series of six, describes how grantees crafted recruitment messages and strategies and developed and disseminated marketing materials to encourage participation in family strengthening and relationship education services by a broad and diverse Hispanic constituency.

Agencies intending to provide services must successfully market their program, recruit, and retain participants. This brief, the second in a series using qualitative data collected during the *HHMI Grantee Implementation Evaluation*, describes how grantees craft recruitment messages and strategies and develop and disseminate marketing materials to encourage participation in family strengthening and relationship education services by a broad and diverse Hispanic constituency. Since there is remarkable diversity in the Hispanic population, it is important to give special attention to how grantees craft various marketing messages, recruitment strategies, and retention efforts for different segments of the target population. Content is based on interviews with all nine *HHMI Grantee Implementation Evaluation* study grantee staff over two rounds of site visits 12 to 18 months apart. The brief first discusses program marketing, then reviews recruitment strategies and finally documents how study grantees attempted to achieve strong retention rates.

Crafting Marketing Messages

While each grantee presented different messages appropriate for their diverse target populations (e.g., males, couples, single adults, new immigrants, etc.) and recruitment venues (e.g., other programs operated by the grantee, institutions of trust in communities such as churches and other faith-based organizations, schools, media outlets, etc.), two consistent themes emerged. The first theme was that messaging about marriage and relationship education had to be positive. Many potential participants were concerned that participation in such a program would indicate that their family had severe problems or that they were on the



verge of divorce. Programs took great care to make sure they framed the program in a positive light such as family strengthening, improving the family or something fun for the family to do together.

Successful marketing strategies often included the following:

- ▶ *Using positive language about services, e.g., Make a good thing better! Strengthen your family!*
- ▶ *Focusing on family-level, rather than couple-level, benefits*
- ▶ *Emphasizing the organization's history or work with the Hispanic community*
- ▶ *Assuring that programs will not recruit participants into membership (for faith-based congregations)*
- ▶ *Indicating to potential referral organizations how clientele participation in the program can benefit the organization*
- ▶ *Writing materials in the appropriate language and literacy level*
- ▶ *Referring to cultural and ethnic symbols that resonate with target population*

A second commonly discussed theme stems from the importance many Hispanics place on the family. Messaging, especially to less acculturated Hispanics, needed to address how the services would benefit the whole family rather than just the couple. As such, programs used such phrases as “Come learn how to be a better parent” rather than “Have a date night with your spouse.” Some grantees actually had corresponding child/adolescent curricula and marketed that component to both parents and children. Parental messaging discussed how the whole family would benefit from attending the program. Marketing to children, in the form of

school presentations, emphasized how fun the program would be for the children themselves and encouraged them to take materials home and ask their parents to enroll the family.

Organizations that had a strong presence or history among the Hispanic community highlighted that strength in their marketing. Some grantees talked about the number of years they had served or been located in a Hispanic community, while others prominently displayed the Spanish surnames of staff and organizational leaders. Faith-based grantees or grantees recruiting from faith-based organizations often found they needed to include an additional component in their marketing message. They perceived that faith-oriented individuals were reluctant to attend or recommend a secular family strengthening program because, for many, faith is a strong component of their marriages. Such grantees intentionally described how the program, while not overtly religious, was congruent with most religious teachings and did not contradict any lessons or principles likely to be taught in most faiths.

Some grantees marketed their services to referral organizations such as family therapy centers or child welfare offices. These grantees spoke about how the program would complement the services provided by the referral organization and possibly decrease the caseloads of overworked employees either by improving marriages and families, thus avoiding child welfare involvement or by empowering and educating current case loads to communicate effectively and resolve conflict safely.

Marketing messages also had to address some basic communication concerns. Grantees placed a great deal of thought into the language used in their written marketing materials, including whether they would be produced in English, Spanish, or both languages (separately or on the same document) and for what reading level. Additionally, grantees attempted to account for the diversity in reading skills and learning styles by including visual imagery, such as pictures of the



classroom or flags, national colors or other national symbols, like soccer teams, to tap into participants' identification with countries of origin.

Deploying Marketing Messages

Successful marketing deployments often included the following:

- ▶ *Personal contact such as door-to-door campaigns, presentations and health fairs*
- ▶ *Traditional print, radio and TV media*
- ▶ *Innovative and internet-based social media*

Grantees employed a wide variety of strategies to deploy their marketing messages. All used a personal, one-on-one approach, such as knocking on doors, staffing a table outside of a local store or clinic, or attending classes at church or a local Head Start to present the program. Many also attended other training events within the organization, such as parenting education, to talk about the relationship and marriage education program. Some grantees set up organizational promotion activities such as health fairs, family days, or relationship advice/education conferences and advertised the program through written materials or actually provided a lesson or an exercise from the class so the audience could get a “feel” for the program.

Grantees also directly marketed their program to staff of potential referral organizations or community leaders through presentations or by providing the entire program (as participants would experience it). Most grantees reported “word of mouth” became the premier marketing tool: their program graduates willingly spread the word about the program throughout their communities. Capitalizing on this, at least one grantee had a formal structure that trained

program graduates to be program volunteers and ambassadors.

The grantees used a variety of print media and paid advertising such as fliers, brochures, direct mailings, newspaper advertisements, ads on buses or trains, or ads in public places like bathrooms. These approaches were tailored to fit the circumstances of each grantee. For example, one grantee put out several press releases about the program which resulted in free newspaper coverage. Several grantees produced radio or TV spots and one participated in a Spanish language call-in radio show as “la doctora del alma” (doctor of the soul). Another grantee, funded to serve a small geographic area of a large city, felt that a large mass media approach would recruit mostly people who did not reside in the qualifying zip codes so they used a more geographically focused approach.

Several grantees also developed new, innovative marketing strategies. One site created a short program promotional video that included real classroom footage. The video ran in the waiting room of this large, multi-program organization. Several other grantees serving more acculturated Hispanics have developed websites, Facebook and My Space pages, and posted interactive videos on youtube.com.

Grantee Recruitment Strategies

Most grantees in the study did not distinguish between marketing and recruitment: for all practical purposes they saw both occurring simultaneously. Grantees expressed an awareness that their target population, mostly lower-income, working class Hispanics, have to juggle multiple commitments and are pressed for time and attention. Thus, sometimes they marketed at a community event with the intention of recruiting on the spot, while other times the intent was to disseminate information about the program so potential participants would call the program later. Often the intent is both: program staff would bring enrollment forms to health fairs and other marketing events and enroll participants on



the spot, obtaining enough contact information to allow follow up with them later for scheduling. Individuals calling in to the grantees for more information following a marketing “encounter” would be given the information, and, if interested, were enrolled over the phone.

Successful recruitment strategies often included the following:

- ▶ *Recruitment during marketing events*
- ▶ *Drawing from the agency’s established clientele*
- ▶ *Word of mouth from past program participants*
- ▶ *Developing referral organization relationships*
- ▶ *Training staff to recruit and provide information for multi-site programs*
- ▶ *Sensitivity to faith issues*
- ▶ *Special attention to recruiting men*
- ▶ *Providing detailed program descriptions*

As with marketing strategies, a common theme echoed by the grantees was that word of mouth by current and former participants was the most successful recruitment strategy. Satisfied participants told other relatives, friends, and acquaintances that the program was beneficial and fun and encouraged them to attend the program too. The success of word of mouth is consistent with the Hispanic cultural value of *personalismo*, which values the personal connection over more impersonal, business-like approaches, including marketing and recruitment efforts. *Personalismo* is not unique to Hispanics, but it is a critical component of how most Hispanics interact with others.

Some of the larger grantees were able to initially recruit in-house from other programs they provided, but all of the grantees needed to look beyond their own clients to meet their enrollment goals. Thus, another recruitment strategy involved forging strong linkages with partner organizations in the community. These linkages were sometimes informal, verbal agreements in keeping with the value of *personalismo*. Other times more formal linkage agreements such as Memoranda of Understanding (MOUs) were developed. Some grantees actually provided the program to the staff of referring organizations as a way to secure buy-in and increase their understanding of the program.

Similar to the concept of referral organizations, some grantees have utilized trusted community leaders as program ambassadors. Pastors, community activists, PTA representatives and trusted community members all served as spokespeople to educate potential clientele about programs.

Grantees verbalized that “recruitment is everyone’s responsibility.” However, each program also assigned recruitment tasks to specific staff. Grantees used program coordinators, facilitators, or dedicated recruitment/outreach staff (who may or may not have been full-time) for recruitment. Grantee organizations with multiple service delivery partners or service sites developed a system of cross-promotion or referrals so that interested potential participants could get information about the most convenient or applicable program. For example, parents who expressed interest in programs like this for their teens were referred to the youth-serving site; someone who saw an ad on the north side of town would be referred to a location closer to his or her home. Some grantees used a centralized recruitment process, like a toll free number or a central website with a calendar and site contact information, while others maintained contact information for partner locations.



Many grantees spoke about the sensitivity involved in recruiting participants from faith-based organizations. Some faith-based organizations were concerned about the program's secular messaging and needed reassurance that the program would be consistent with its own religious teachings. Additional sensitivity was needed if the organization providing services was also faith-based. Some grantees felt that other faith-based organizations were concerned that program participation would lead to losing congregation members (i.e., they would join the organization providing the service), and expressed the need to be sensitive to that concern during recruitment.

Most grantees felt that men were more difficult to recruit into programs than women. As such, they used various techniques to increase male enrollment, including offering classes at various times to accommodate both traditional and nontraditional work schedules; having male staff at the organization, including male program facilitators; using the term "workshop" rather than "class" or "course;" and coaching interested women in ways to talk about the program that would encourage their male partners to attend.

Grantees found that providing a good deal of information about the program was helpful with recruitment efforts. Pictures and short bios of the facilitators, pictures of the facility being used, including a welcoming classroom, and descriptions of lessons were all used to inform potential participants about the program experience and encourage them to attend the first session.

Grantee Efforts to Enhance Retention

Program retention is one of the most formidable challenges for all health and human services providers. This is especially true when providing services to poorer, marginalized communities.¹

Many grantees stated that one of the most significant barriers to retention involved the length of the program. Grantees grappled with balancing their concerns for participants' ability

to retain the information learned and practice the skills discussed, with the grantee's need to retain participants for the duration of the program. For instance, workshops scheduled over longer stretches of time (e.g., a 2-hour class one evening a week for 12 weeks) enabled some participants to better work through the materials and share with the group how they were using the information and skills at home.

Successful retention strategies often included the following:

- ▶ *Balancing the length of the program with retention goals*
- ▶ *Providing a welcoming, fun and interactive classroom experience*
- ▶ *Reducing participation burdens by providing food, transportation assistance, and child care*
- ▶ *Contacting absent participants and providing make-up sessions*
- ▶ *Working with participants' employers to secure program participation buy-in*

Longer time periods for classes also allowed facilitators to better develop trusting relationships with participants. However, grantees felt these longer programs often resulted in lower retention (i.e., completion) rates. Shorter programs (e.g., two full days over the course of a weekend, or three consecutive Saturdays) were perceived as resulting in higher retention (completion) rates, but sometimes at the expense of less information retained and fewer opportunities for the facilitators to observe or hear about the maintenance and generalization of skills.

Given the need to meet program completion targets, some grantees changed their delivery format to longer sessions spread over a shorter period of time in an effort to increase retention. Other programs continued to deliver their curricula over several months and were pleased with their retention rates. These grantees credited their retention rates to their reputation in



and trust by the community, and the desire of many participants to remain connected to the agency. Additionally, they felt that the families formed friendships and continued attending the program to socialize and visit. Achieving the right balance is influenced by many factors. Grantees must think proactively about what works best for them and their target population; this was a key lesson learned for many of the grantees in the study.

Grantees identified numerous factors that facilitated participant retention in their programs. Classroom factors included instruction in the participant's preferred language; skillful facilitators who understood participants' culture or came from backgrounds similar to the participants; and a fun, interactive, and culturally relevant curriculum that appealed to the participants regardless of literacy levels and after a long day of work. Also, an agency with an overall "welcoming feel," including friendly staff and a comfortable classroom helped retention. Some grantees used past program graduates as volunteers to greet participants and assist with program logistics.

The grantees worked hard to reduce burdens to program participation. All programs had on-site child care so parents could check in on their children throughout the program module. Food and refreshments were provided so families did not have to cook before or after the program. Most grantees tried to provide culturally appropriate food and some even encouraged participants to bring dishes from home to share as a way to foster communication and pride. It was also important for programs to make it easy to physically get to the workshops. Some grantees provided the program in locations throughout the target community, while others provided gas or bus cards to reimburse transportation costs. Additionally, several grantees used program supports or incentives, such as a gift card at graduation to encourage continued attendance.

Attention to participants' schedules and the use of reminders were also important retention tactics. Some grantees maintained frequent contact with participants through phone calls, postcards or emails and ensured that participants had each class in their calendar. They also paid close attention to the target populations' work schedules, and offered classes on weekends or evenings. This flexibility was critical, since many in the target communities work non-traditional schedules. Additionally, programs were offered in ways that addressed participants' holiday schedules. One grantee, for example, worked primarily with first generation Mexican American families who traditionally take long vacations back to Mexico over the Christmas holiday. This grantee provided a month-long break in the program to ensure that families did not miss classes.

Inevitably, some participants missed a class. Grantees emphasized the importance of following up with the participant or couple, rather than just waiting for them to show up at the next session. Offering encouragement to attend the next session, discussing solutions to attendance problems in order to prevent future missed classes, and providing make-up sessions were all strategies that helped retain families with attendance challenges.

Grantees reported that participants' jobs were often a barrier to program completion. To address this, some grantees offered to describe the program and its spillover work-related benefits to participants' employers so the participants could be excused from work to attend the program. Conversely, some program participants were unemployed. One grantee offered, as a program completion incentive, a letter of recommendation for future employers that described the skills the participant learned in the class, such as conflict resolution and effective communication skills.

Summary

The nine participating grantees in this Implementation Evaluation devised marketing,



recruitment, and retention strategies that enabled them to serve a population that can be very challenging to recruit and retain. Some of these strategies were based on an understanding of the cultural values, beliefs, and practices of the target population. Other strategies were based on the grantees' knowledge of serving low socioeconomic groups. Still others emerged from the experience of serving inner city, marginalized populations. Grantees consistently reported that personal interactions were one of the best ways to market the program, recruit potential participants, and retain current participants. Agencies wanting to serve the broad and diverse Hispanic community must attend to culture and context in designing and implementing marketing, recruitment, and retention strategies.

Further Information

Brief No. 1 of HHMI Project Series: *Providing Culturally Relevant Services: Programs in the Hispanic Healthy Marriage Initiative Implementation Evaluation*; (June, 2010).

For additional information about the HHMI Grantee Implementation Evaluation, please contact the Federal Task Order Officers or the evaluation team.

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