

*Provider Resiliency Evaluation*

# **Healthcare Workforce Survey Outreach Email Guide**

*This document provides guidance to distribute the Healthcare Workforce Survey to individuals impacted by your HRSA-funded programs.*

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## 1. Introduction

As you may know, NORC at the University of Chicago (NORC) is conducting an evaluation on behalf of HRSA to understand the impact and implementation of programs to promote resiliency and reduce burnout in the healthcare workforce.

A crucial part of this evaluation is a 15-minute web-based survey of the individuals who were impacted by your HRSA-funded program. Due to awardees' concerns about individuals' privacy and IRB limitations, NORC did not request individuals' names and email addresses to field this survey. Instead, we ask that you use NORC's U.S. Office of Management and Budget (OMB)-approved templates to email the survey invitation and reminders.

## 2. What do we need to do?

Please use the detailed step-by-step instructions in this Email Outreach Guide to **send email invitations for this critical web-based survey** about HRSA-funded programs and activities aimed to improve resiliency and reduce burnout among healthcare workers and students. We ask you to:

1. **Send a prenotification email** to notify recipients that you will send the survey and request they complete it.
2. **Email an initial invitation** requesting that they complete the survey. The email will include a link to the survey that they can take anonymously.
3. **Send reminder emails.** NORC will email you each week during the six-week survey period with reminders about which template to send the following week.
4. **Complete a Fielding Tracker.** As part of this process, you will need to capture aggregated information about when and to whom you send these emails in an Excel file called a **Fielding Tracker**.
  - a. The information you include in the **Fielding Tracker** provides *essential* information for estimating the survey completion rate.
  - b. Please email NORC your completed **Fielding Tracker** at the three-week (midpoint) and six-week (end) survey data collection period.
  - c. You will receive weekly reminders to update the **Fielding Tracker** during the six-week survey period.

We truly appreciate your essential contribution of emailing the survey and collecting information about the emails and those you invited to complete the survey.

*NORC's ability to analyze the survey data depends on you sending the invitation and reminder emails, as well as accurately capturing information about the emails in the Fielding Tracker.*

Collecting these survey responses is important to HRSA, as survey answers will provide feedback about grant-funded programming and activities and inform decisions about how HRSA invests in future programs that address burnout.

### 3. What is this Healthcare Workforce Survey about?

The survey will capture data on individuals' experiences with grant-funded trainings, services, or other activities with regards to burnout, resiliency, and wellness.

The survey will ask questions about:

- individuals' experiences with awardee organization activities and programs,
- use of resources,
- how their experiences in the workplace have changed over the past year, and
- what is most helpful in supporting them at work or in their trainee program.

As mentioned, survey answers will provide feedback about grant-funded programming and activities and inform decisions about how HRSA invests in future programs that address burnout.

For more information about the Healthcare Workforce Survey, please refer to the Frequently Asked Questions (FAQs) at [hcwffags.norc.org](http://hcwffags.norc.org).

### 4. What are these emails?

We ask your organization to **send a total of seven emails** (see separate attachment 3) to individuals impacted by your HRSA-funded programs:

**1 pre-notification email about the upcoming web-based survey**

**1 initial invitation to complete the web-based survey**

**5 reminder emails**

Please send the emails on a weekly basis (for a total of seven weeks). Attachment 3 includes customized email templates for all seven emails that you can copy directly to the body of an email. Please note that OMB has reviewed and approved these templates and they **cannot** be tweaked or edited further.

The emails include:

- a brief overview of the survey purpose,
- a unique survey link for your awardee organization, and
- the NORC Survey Support Team's contact information in case any questions arise.

In Table 1 please find a schedule of email communications to send.

**Table 1: Timing of Healthcare Workforce Survey Communications**

<b>Email to Send</b>	<b>Week of</b>	<b>Email Title or Action</b>	<b>Description</b>
<b>Week 0</b>	March 25	Healthcare Workforce Survey Pre-notification	- Introduction to the survey.
<b>Week 1</b>	April 1	Healthcare Workforce Survey Initial Email	- Initial contact email asking individuals to complete the survey to help address burnout in the workforce.
<b>Week 2</b>	April 8	Healthcare Workforce Survey Reminder 1	- Reminder to complete the survey. <i>- Send approximately one week after the Healthcare Workforce Survey Initial Email Invitation.</i>
<b>Week 3</b>	April 15	Healthcare Workforce Survey Reminder 2	- Reminder to complete the survey. <i>- Send approximately one week after the Healthcare Workforce Survey Reminder Email 1.</i>
		<i>Submit interim Fielding Tracker to NORC</i>	- See Section 5 below.
<b>Week 4</b>	April 22	Healthcare Workforce Survey Reminder 3	- Reminder to complete the survey. <i>- Send approximately one week after the Healthcare Workforce Survey Reminder Email 2.</i>
<b>Week 5</b>	April 29	Healthcare Workforce Survey Last Chance 1	- Reminder to complete the survey and note that the survey is ending soon. <i>- Send approximately one week after the Healthcare Workforce Survey Reminder Email 3.</i>
<b>Week 6</b>	May 6	Healthcare Workforce Survey Last Chance 2	- Reminder to complete the survey and note that the survey is ending soon. <i>- Send approximately one week after the Healthcare Workforce Survey Last Chance Email 1.</i>
	BY May 20	<i>Submit final, completed Fielding Tracker to NORC</i>	

## How do we send out the emails?

### Body of the Email and Email Subject Line

1. Copy the email invitation (e.g., Healthcare Workforce Survey Pre-notification (located in Attachment 3) into the body of a blank email.
2. Cut and paste the subject line from the template into the subject line of the email.
  - a. I.e., for the initial email invitation, insert “**Upcoming Healthcare Workforce Survey Notification – 1 WEEK AWAY**” into the subject line of the email).
  - b. Delete the words, “Subject line.”
3. Review the email to ensure you copied the entire message. Remember to check for the following:
  - a. Subject line text is accurate and complete
  - b. Greeting (i.e., “Hello.”)
  - c. All headings and text from the email template
  - d. Survey URL
  - e. NORC’s contact information
  - f. Full signature line
4. Check for any incomplete information in the body of the email – i.e., any text in brackets like **[DATE]**.
  - a. Make sure to fill in the appropriate date for the context of the sentence.

### Adding Individuals’ Email Addresses

5. Record the total number of email addresses in your original list or Excel file (you will add this later to the Fielding Tracker).
  - a. This should **include all individuals you invited to complete the survey** for whom you have an email address.
  - b. This should be the **same** list of individuals’ emails for each of the seven emails you will send minus any bounceback or undeliverable messages.
6. Copy and paste all email addresses from your Excel spreadsheet or other document into the “**BCC:**” (blind carbon copy) field of the email.
  - a. Using the BCC feature will ensure that individual’s identification is kept private from one another.
  - b. If you receive any bounceback or undeliverable emails, remember to remove the undeliverable email address when sending the rest of the emails.
7. Add [norceval@norc.org](mailto:norceval@norc.org) to the BCC field.
8. Review the full email one last time to ensure:
  - a. All email addresses are included. (That the first and last email addresses were not accidentally shortened during the copy and paste.)
  - b. Read the subject line to ensure the complete subject line is included.
  - c. Review the body of the email as in **Step 3 above**.
9. Click Send.
10. Open the **Fielding Tracker** Excel file to record the required information.

- a. See the section below, *What is the Fielding Tracker* and refer to the Instructions tab of the Fielding Tracker Excel file.

11. Repeat steps 1-10 for each of the seven emails.

### Responding to Questions about the Survey

If anyone responds with questions, please reply to the email, referring them to the NORC helpdesk [norceval@norc.org](mailto:norceval@norc.org). Make sure to copy NORC in the email response under the CC (carbon copy) line so that NORC can reply directly to the request. NORC will then address the individuals' questions and troubleshoot any issues. Please copy and paste the below example language into a response email for questions:

Thank you for your question. We are forwarding your message to NORC at the University of Chicago (copied here) who has been contracted by HRSA to conduct the survey.

NORC will reach out to you directly to answer your questions and provide any technical assistance needed. Please be on the lookout for an email from the NORC Survey Support Team, [norceval@norc.org](mailto:norceval@norc.org).

For additional information, please visit our frequently asked questions (FAQs) at [hcwffaq.s.norc.org](http://hcwffaq.s.norc.org) or leave a message at 888-201-3291.

### Reminder Email Best Practices

Please review the following recommendations for sending the survey emails to encourage maximum participation:

- Try to vary the time of day you send the emails on a weekly basis in case certain times work better than others (i.e., send the email at 9 a.m. on week 1 and 12 p.m. on week 2).
- Send each email within approximately one week of each other.
  - If possible, to maximize responses, try to send the emails within one business day difference across the six-week data collection period (e.g., each Monday for week 1, week 2, etc. or Monday during week 1, Tuesday during week 2, Wednesday during week 3, etc.)
- Put reminders in your calendar for sending each email over the course of the seven-week period.

## 5. What is the Fielding Tracker?

The Fielding Tracker (Attachment 2) will capture essential information about the email outreach process and will help NORC estimate a survey completion rate. We ask you to report the following information in the Fielding Tracker:

Number of emails sent

Number of undeliverable emails

Target population demographics

Since personal identifiable information (PII) for individuals who were impacted by your HRSA-funded program cannot be shared with NORC, providing this information through the Tracker is crucial to the success of the evaluation and will allow NORC to provide you with assistance as needed throughout the seven weeks.

The staff member who completes the Fielding Tracker should be the same person who sends the seven total emails (Healthcare Workforce Survey pre-notification, invitation, and reminder emails). NORC recommends limiting this responsibility to one or two staff members who possess appropriate data reporting skills and/or access to participant email addresses, such as HR, IT, or administrative staff.

If you plan to have different staff members send the Healthcare Workforce Survey emails to various sites, please contact [norceval@norc.org](mailto:norceval@norc.org) with the staff members' names and email addresses. This will enable NORC to communicate with them directly and streamline the outreach and data collection processes.

#### How do I complete the Fielding Tracker?

Please update the Fielding Tracker immediately after sending each email (Weeks 0-6) while the information is fresh in your mind. After you become familiar with the Fielding Tracker and the requested information, it will only take a few minutes to update the Fielding Tracker for the following week's email.

In addition to collecting information about the number and dates of emails sent, the Fielding Tracker will collect demographic information about those who are invited to complete the survey. This information includes age, gender, race/ethnicity, and number of individuals within various disciplines/professions (e.g., physician, physician's assistant, nurse, etc.). NORC will use this information to conduct a non-response bias analysis required for the evaluation.

The first tab of the Tracker contains detailed instructions on how to complete each required section, as well as definitions for each field. After sending the "Healthcare Workforce Survey Reminder 2 Email" (two weeks after data collection begins), **please send NORC your interim Fielding Tracker to assess data collection progress and provide an initial overview to HRSA.** Please complete the demographics section before this interim submission.

**After the seven-week survey fielding period, please email your completed Fielding Tracker to NORC at [norceval@norc.org](mailto:norceval@norc.org) by Monday, May 20th.**

Table 2 shares the required email tracking fields and provides example entries. Additional fielding tracker support materials can be found in Attachment 2.



Table 2: Fielding Tracker Example

Email Type	Date Sent	Time Sent	Number of Email Addresses Sent To	Number of Bounceback Emails Received	Number of Individuals Without Email Info	Total Number of Individuals	Notes
Pre-notification Email	March 25, 2024	9:05 am	75	5*	8	83	We were unable to obtain email addresses for first year students
Initial Email Invitation	April 1, 2024	12:00 pm	72**	1	8	80	
Reminder 1							
Reminder 2***							
Reminder 3							
Last Chance 1							
Last Chance 2							

For this example: Let's assume that 2 of these 5 bounceback emails include updated email addresses.

\*Remember that bounceback (undeliverable emails) emails may include individuals' updated email addresses. If you receive an updated email address

- please resend the email to those individuals' new email addresses and
- update these in your records for sending the remaining emails.

\*\* $(75 \text{ (initial emails sent)} - 5 \text{ (bounceback emails)}) + 2 \text{ (new email addresses provided in the bounceback emails)}$

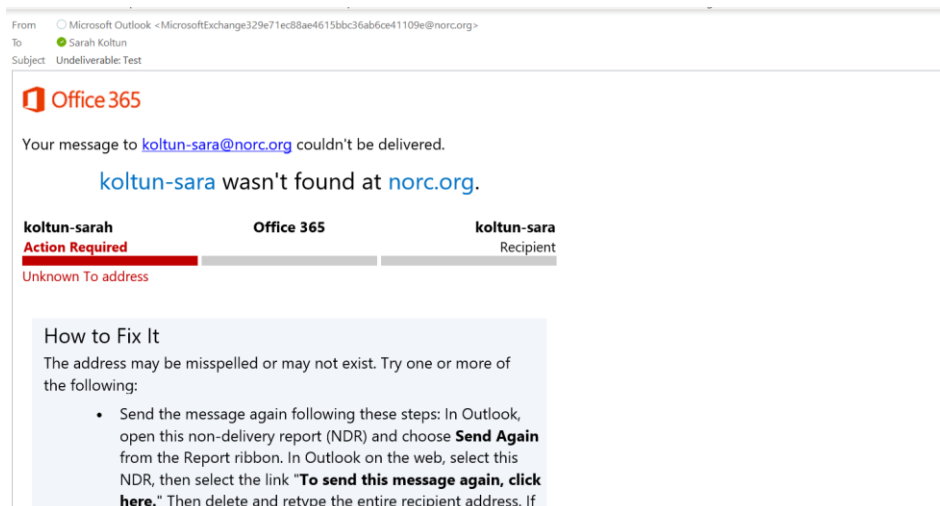
\*\*\*After Reminder 2, email interim completed Fielding Tracker to NORC.

### Fielding Tracker Best Practices

Please review the following recommendations for completing the Fielding Tracker.

- Record the number of emails sent in the Fielding Tracker immediately after sending each of the seven emails.
- Make sure to record the correct dates in each row of the Fielding Tracker.
  - *This will ensure NORC can address any issues that may arise.*
- You will typically receive bounceback emails (undeliverable emails) with error messages within 24 hours of sending an email. Record these in the Fielding Tracker, even if you've already recorded that week's email information.
  - If the bounceback email message includes a new email address, please forward the email invitation via the new email address and update the Fielding Tracker.
  - See Figure 1 for an example of a bounceback email.

Figure 1:



Attachment 2: Fielding Tracker

Attachment 3: Customized Email Templates

1. Healthcare Workforce Pre-notification
2. Healthcare Workforce Survey Initial Invitation
3. Healthcare Workforce Survey Reminder 1
4. Healthcare Workforce Survey Reminder 2
5. Healthcare Workforce Survey Reminder 3
6. Healthcare Workforce Survey Last Chance 1
7. Healthcare Survey Last Chance 2