

Tai Chi Pre-Program Survey Call Instructions

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 Melissa and signed up for a Tai Chi workshop. My name is Christy 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). Most of the information on the survey is optional, but there are some questions that are required because our funding to provide these workshops for free depends on this information. If the survey doesn't let them move on to the next page or submit, the questions that require answers will turn red so that they know what to go back and enter.
- Ask them to open the survey
 - o Make sure you have the correct survey link.
 - o If you have their email address or cell number you can send them the link via email or text for them to click.
 - o If you don't have their email address or cell number, make sure the link is short enough for them to type into their browser. To make a link shorter you can create a new URL through bit.ly (basic accounts are free).
- Ask them what they see (verify that the page they see has the correct page title).
- Ask them to go ahead and complete the survey. They don't have to tell you any of their answers, but you'll stay on the line in case they have questions. Ask them to let you know if they have questions or when they have completed the survey. This may take some time, so be patient.
- When they say they have completed the survey, ask what they see on their screen. It should be a page with all of the login information they will need to join the program. Explain that the information on this page is going to help them connect to the workshop, so they can keep this page to use later by printing or writing down the information.
- Tell them you're going to call them back next week to help them get everything set up on their device and show them how to connect to the workshop. It's going to take about 15-30 minutes of their time.
- Tell them what time to expect a call from you or ask when the best time to call back would be.