Lessons Learned from Quitline and 1-800-BETS OFF Simulated Client Call Evaluation

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Support & Disclaimer

Content

1. Overview of design components of Simulated Client Call evaluation

2. Implementation of Quitline evaluation

3. Implementation of 1-800-BETS OFF evaluation

Purpose of Evaluations

Purpose: To design, implement, and provide feedback to the state stakeholders about two helplines in Iowa

Quitline Iowa

1-800 BETS OFF

Quitline Iowa Background

Quitline Iowa

- Telephone and online tobacco cessation service
- Operating since 2001
- Connects all Iowa residents with expert coaches that provide counseling
- Call volume
  - Quitline Iowa averages 500 new callers per month
  - 10 to 16 attempted simulated client calls (about 1%) per month

1-800 BETS OFF
Background

1-800 BETS OFF

- Gambling information/referral source
- Operating since 1987
- Connects all Iowa residents with trained operators
- Call volume
  - 1-800 BETS OFF averages 50 referrals per month
  - 6 to 7 simulated client calls (> 10%) per month

Simulated Clients Definition

"Simulated clients"—methodology involving creation of pseudo-clients to allow active observation/experience with data collection

- Primarily used in:
  - Business
  - Community planning
  - Emergency call centers

Overall Design of Simulated Client Calls

Main Aspects of Project Design

- Establishing the goal(s) of the evaluation
- Ethical considerations
- Building the evaluation team & budgeting
- Creating simulated caller profiles
- Selecting and training callers
- Implementing the calls
- Analyzing the data

Establishing Goals of Evaluation

Establishing goals with client (IDPH)

- Process intake
- Quality of engagement
- Match with existing protocol or standards

Establishing Evaluation Objectives

Evaluation objectives (measurable)

Primary call characteristics

- Subjective evaluation yet same 'ruler' for all
- Consistency (to create comparable cases)
- To know/understand expected outcome/interaction

Required minimum volume of calls

- When a statistical outcome is needed
- To assess consistency
- To explore potential scenarios
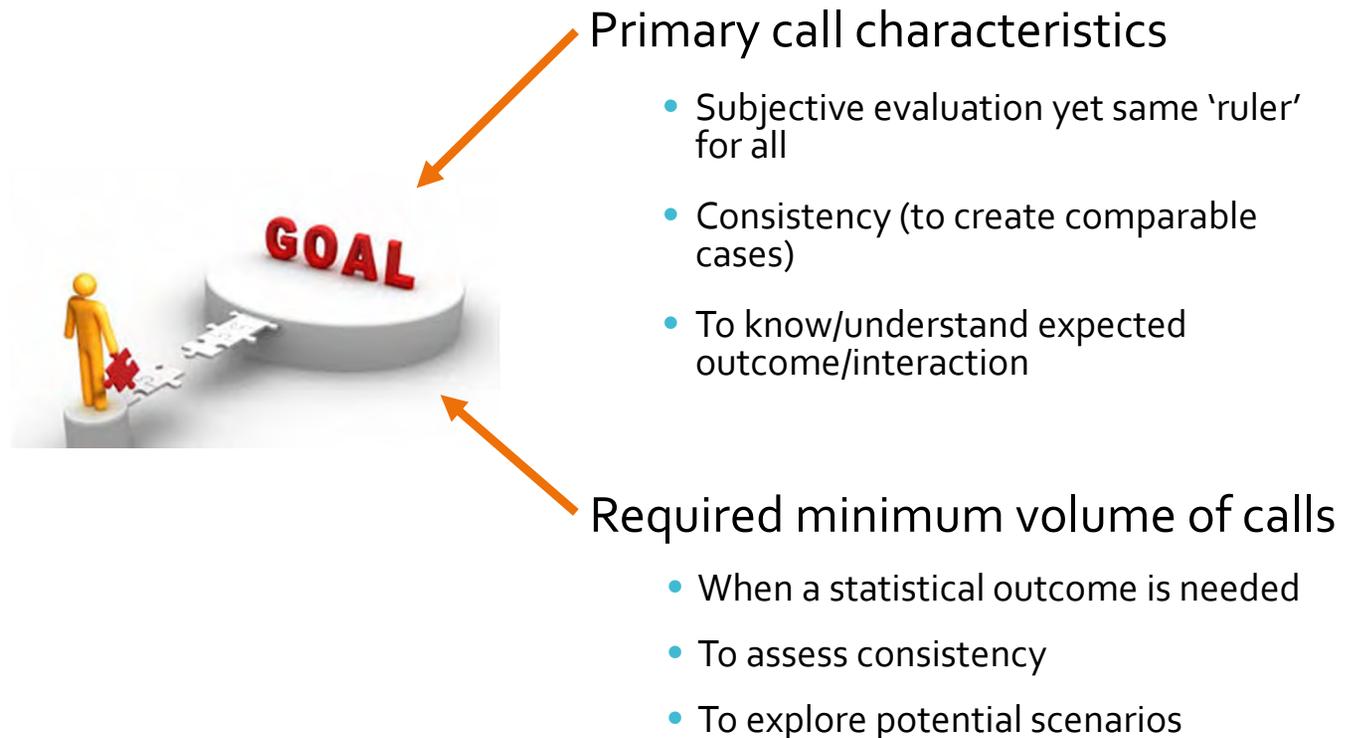
Building Evaluation Team

Team members

- Project coordinator
- Callers
- Transcriptionist (external)
- Data entry personnel
- Analyst

Planning the Project Budget

Budgeting

- Technology (e.g., phone numbers, recorders, headsets, etc.)
- Callers
- Length of evaluation and targeted number of calls
- Transcriptions (external)
- Data entry and analysis
  - Profile summary statistics
  - Evaluation form
  - Qualitative transcript analysis
- Report writing
- Dissemination of findings

Planning Project Evaluation Tools

Evaluation Tools

- Collaborate w/ state agency to determine service intentions
  - Review contractual obligations
- Request intake/counseling protocol from service provider
- Call characteristics
  - Following prescribed protocol
  - Duration, hold times, perceived audio quality
  - Perceived coaching quality (i.e., engagement, ability to motivate caller

Quitline: Creating Caller Profiles

Caller Profiles

- Review state-level demographic characteristics of Quitline participants and create representative caller profiles

Number	(319) 244-8123
Profile #	5
Name	Ann Lewis
Gender	Female
DOB	4/24/1987
Age	28
Address	220 E Granger Ave, Des Moines IA 50315
Email Address	annlewis42487@gmail.com
How heard about IAQL?	Friend
Tobacco products:	Cigarettes
# / day	20
After waking	5 min
Age @ start	19
Years using tobacco	9 years
# past quit attempts	0
E-Cigs?	Yes
Mental Health Issues	No

Physical Health issues	No
Pregnant	No
Education	High School
Currently in college	Yes
Hispanic or Latino	Yes
Race	White/Hispanic
# of ppl in household	1
Live with smoker	No
Willing to quit with you?	No
Children?	No
Marital status?	Single
Sexual orientation?	Straight
Employed?	Yes
Employer?	Self-employed
Health insurance?	Yes
Insurance company?	Blue Cross/Blue Shield
Military?	No
Quitdate set?	

Quitline: Planning Calls

Three call types

- Registration (1 time; first call)
- Initial Counseling (1 time; first call)
- Post-registration counseling (4 times; follow-up calls)

Determining number of calls

- Contracted for 10 calls per month
- Schedule 13-16 calls per month
- Attempts vs completes
  - Dropped calls
  - Excessive hold times
  - Forced voicemails

Quitline: Special Considerations

Special Considerations

- NRT medication delivery

- Special populations

- Web-based coaching program

- Remove profile contact info from follow-up evaluation sample

- Evening/after hours calls

Quitline: Scheduling Calls

Scheduling

- Primarily used Microsoft Excel and Google Calendar

  - Easily accessible

  - Automatically timed notifications directly to caller

  - Universal location for data entry

- Considerations when scheduling

  - Time variability

  - Troubleshooting

  - Difficult profiles

Ideal vs Realistic Scheduling

Quitline: Scheduling Calls

IDEAL

	February			March			
	2/13 - 2/17	2/20 - 2/24	2/27 - 3/3	3/6 - 3/10	3/13 - 3/17	3/20 - 3/24	3/27 - 3/31
Devon Wesley	Registration		FU1		FU2		FU3
Zachary Kingston	Registration		FU1		FU2		FU3
Bill Lawerence		Registration		FU1		FU2	
Justin Vernon							
Dom Nunez							
Brian Walters							
Jacob Quentin							
Barbara Jackson	Registration		FU1		FU2		FU3
Julie Peterson	Registration		FU1		FU2		FU3
Rosie Short		Registration		FU1			
Ann Lewis			Registration		FU1		FU2

REALISTIC

	February			March			
	2/13 - 2/17	2/20 - 2/24	2/27 - 3/3	3/6 - 3/10	3/13 - 3/17	3/20 - 3/24	3/27 - 3/31
Devon Wesley	Reg.#--AM				FU1#--AM		
Zachary Kingston	Reg.#--AM				FU1#--AM		
Bill Lawerence		Reg.#--AM				FU1#--AM	
Justin Vernon			Reg.#--AM				FU1#--PM
Dom Nunez							
Brian Walters						Reg.#--AM	
Jacob Quentin							
Barbara Jackson	Reg.##--A/P				FU1#--AM		
Julie Peterson	Reg.#--PM				FU1#--AM		
Rosie Short		Reg.#--PM				Reg. Pt 2#--AM	Reg. Pt 2##--PM
Ann Lewis			Reg.#--AM				FU1#--PM

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Quitline: Selecting & Training Callers

Training Simulated Client Callers

- Selection: CSBR's RAs with IRB and human subjects training

- Use training document:

  - Outlines purpose, expectations, and sequencing of tasks

  - Standardizes data collection

    - Locations of materials

    - Directions for proper uploading procedures

    - Examples of "good" and "poor" calls

  - Acts as reference after training

- In-depth monitoring during initial data collection period

- Continued monitoring

Quitline: Training Callers

Before and during first call, caller should:

- Review profile in-depth and plan responses to common questions
    - What do you use/smoke?
    - When do you use/smoke most often in the day?
    - What are your triggers?
    - Why do you want to quit?
    - Who are your support systems?
- Review training document/materials
- Ensure audio recording
- Maintain engagement throughout call
    - Avoid sighing, pen clicking, mono-toned voice
    - Avoid one-word responses

Quitline: Training Callers

Before and during follow-up calls, caller should:

- Review profile and past responses
- Incorporate past responses to "sell" profile
- Ensure audio recording
- Maintain engagement throughout call

After any call, caller should:

- Listen to call and complete evaluation form
- Upload audio recordings
- Give completed evaluation form to project coordinator

QUITLINE IOWA
I 800 QUIT NOW | I 800 784 8669
WWW.QUITLINEIOWA.ORG

Quitline: Initial Stage of Call Implementation

Initial Stage of Data Collection

- Expect adaptations to profiles, scheduling, callers, evaluation forms, etc.

- Monitor interactions between caller and helpline

- Oversee alignment of expected contractual obligations

Quitline: Data Collection & Data Entry

Ongoing Data Collection

- Maintaining contractual volume of calls
- Continued monitoring / quality control of callers
- Adjustments in calendar and budget

Data-entry decision-making

Who?	Project coordinator or trained data personnel
What to include?	All questions from Evaluation Form and timing durations
How often?	Monthly
Which program?	Microsoft Excel

Analysis

Analysis

- Standardized data: Length of calls, number of calls, frequency and timing of calls, wait times, etc.

- Subjective evaluation of overall call: By the caller & coordinator, yet uniform across the calls

- Non-standardized data: Operators interactions, names, or special cases like not knowing what to do during the call

IMPORTANT:

- Focus on Client's need

- Address ethical considerations

- <u>Ultimate goal</u>: Improve the public service

Quitline: Report Writing

Considerations when writing
- Who is the main reader?
  - Do they know statistic?
  - Do they prefer infographics and/or texts?

While writing, a minimum of content could be as an example:
- Compliance with Prescribed Protocols
- Call Characteristics
  - Objective
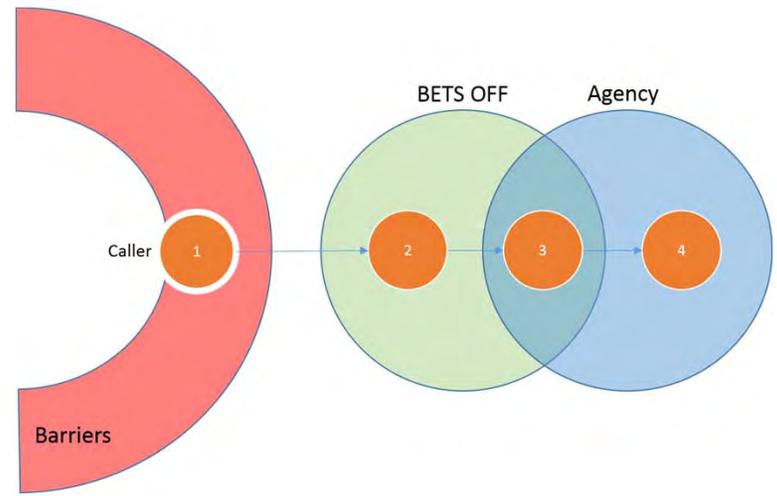 - Subjective

1-800-BETS OFF: Designing a project

Let's design the project

BETS OFF: Call Process

1-800 BETS OFF Problem Gambler Call Process

1. Call
2. Interaction with 1-800 BETS OFF operator(s)
3. Warm Handoff (if needed)
4. Callers in the agency (usually considered as crisis call)
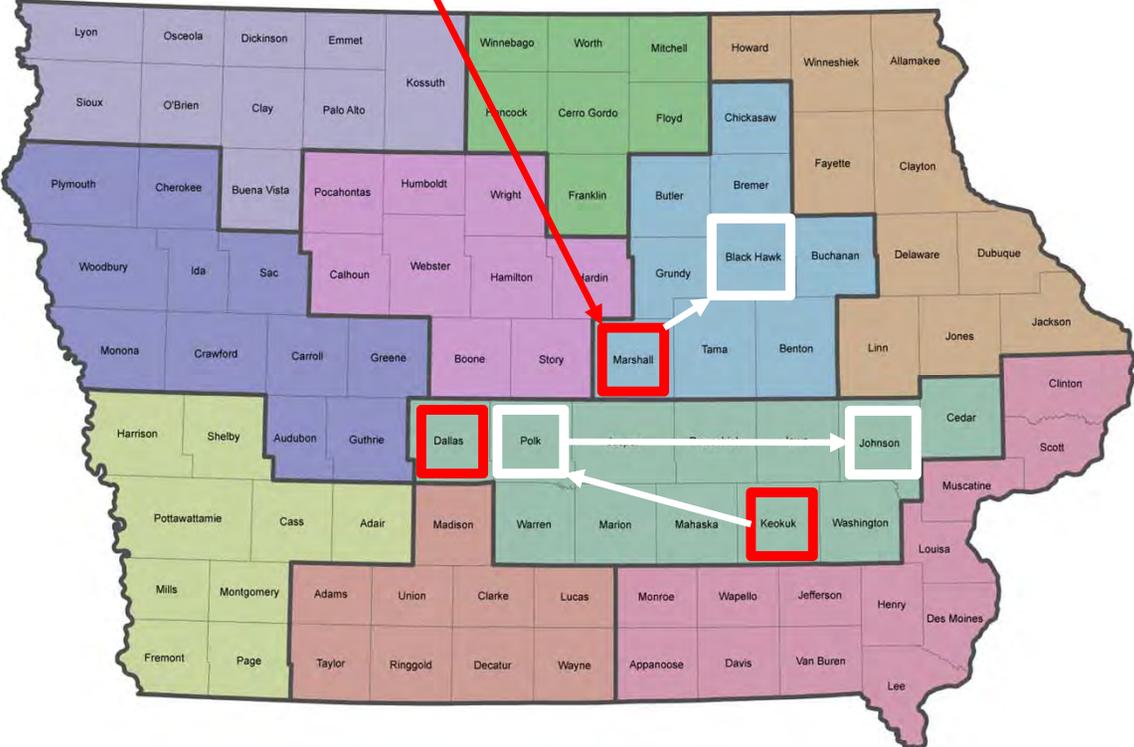
**BETS OFF:
Unique Features**

Unique characteristics of BETS OFF services

- Source of referral (no coaching)
- Referrals/warm handoff to an agency depends on callers' place of residence
- Low volume of calls (500 in-state calls per month)
- Low number of referrals/warm handoff (50 a month)
- Relatively smaller number of 1-800 BETS OFF operators

1-800 BETS OFF: Potential Process of Warm Handoff

Caller from Marshall county

Problem Gambling Treatment Providers

1-800 BETS OFF Referrals (FY 2016)

1-800-BETS OFF Referrals
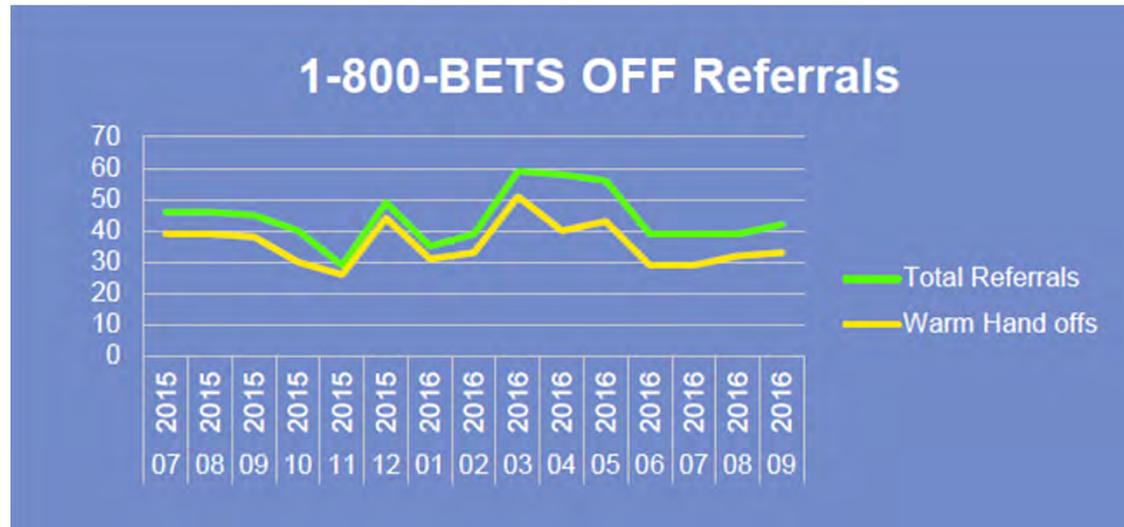
1-800 BETS OFF evaluation design

What do we need?

What do you need in callers' profiles?

How many calls would you make a month?

What would be your main goal?

What are the key objectives?

What are unique features of 1-800 BETS OFF ?

1-800 BETS OFF evaluation design (cont.)

Compared to the number of Quitline operators, the number of operators in 1-800 BETS OFF is smaller.

There is not much research on evaluating gambling helplines

What can be assessed in the number of calls in the design?
    What are the limitations?
    What are the advantages?

What happens at the agency?
    Is this part of the assessment?

BETS OFF: Problem Gambler Profiles

Problem Gambler Profiles

- Based on demographic characteristics and gambling behaviors of Iowa Gambling Prevalence study participants

- Key info needed for adaptation:
  - Callers' residence (county)
  - Nearest casino
  - Profiles' 'designated' agency

- Few caller profiles needed due to total volume of calls and referrals

- Number of calls aim to match the proportion of calls to 1-800 BETS OFF historical data

BETS OFF: Evaluation Form (3 pages)

CSBR caller's check list

CSBR's caller:			Comment:
Gambler's name:			
Mode:	Phone ☐	Web-Chat ☐	
Day of the call/chat:	Choose a date		
Time of the call/chat:	Choose a time		
Calling to BETSOFF			
Wait time 1 (in seconds)	Choose an item.		Comment:
Answered:	Yes ☐	No ☐	
Greeted in a friendly manner (BETSOFF staff)	Yes ☐	No ☐	
Showed enthusiasm (BETSOFF staff)	Yes ☐	No ☐	
BETSOFF requirements by IDPH contract			
Asked for CALLER's:			Comments:
Name	Yes ☐	No ☐	
Phone number	Yes ☐	No ☐	
State (if IA)	Yes ☐	No ☐	
County	Yes ☐	No ☐	
Other (Clarify)	Yes ☐	No ☐	

CALL NOW. 1-800-BETS OFF
IOWA GAMBLING TREATMENT PROGRAM
brought to you by IDPH

BETS OFF: Evaluation Form (cont.)

CSBR caller's check list (cont.)

BETSOFF requirements by IDPH contract					
With the agency staff					
Thinking back on the call, rate your overall impressions of the call	Poor	Fair	Good	Very Good	Excellent
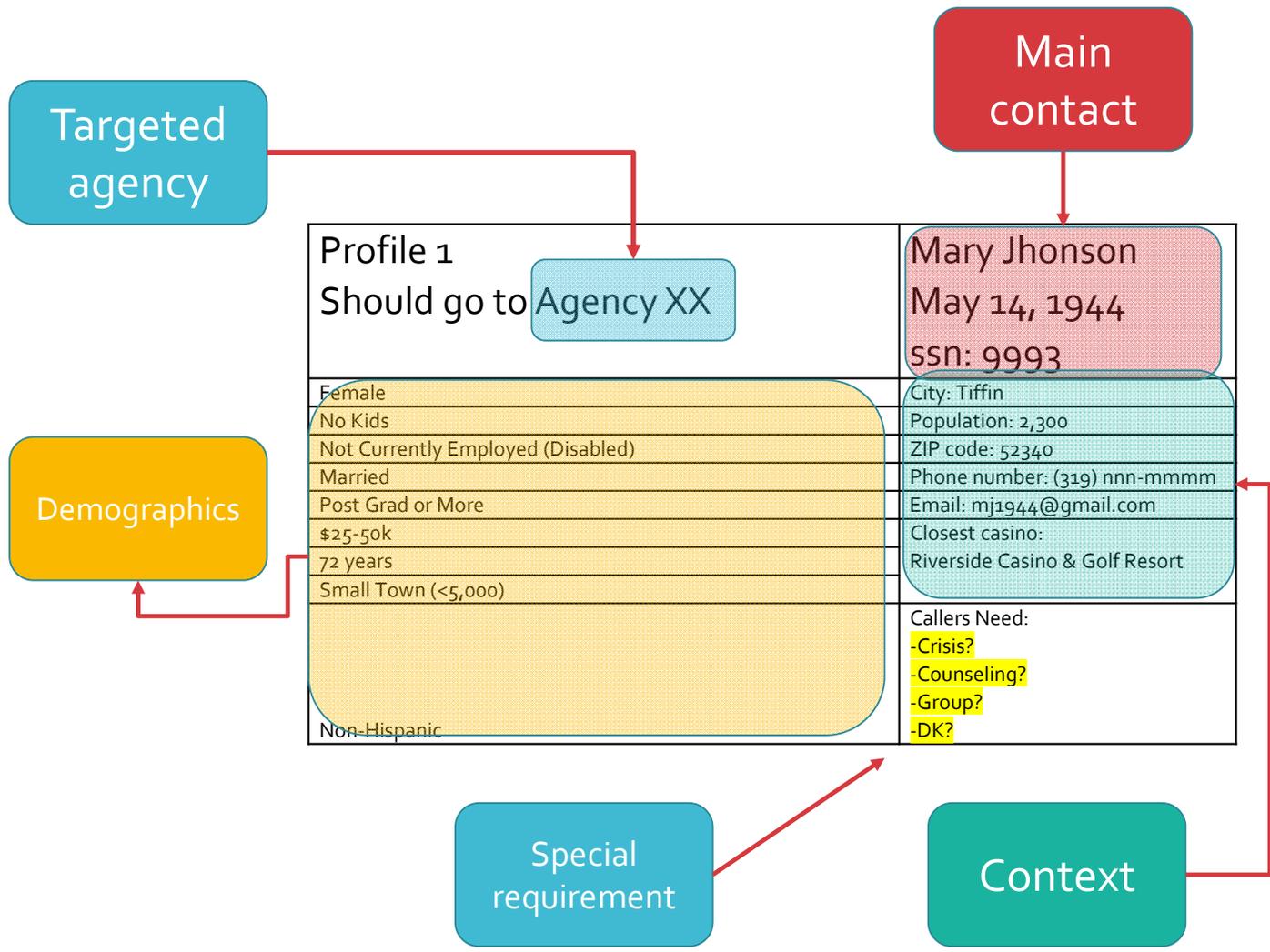
CALL NOW. **1-800-BETS OFF**
IOWA GAMBLING TREATMENT PROGRAM
brought to you by IDPH

BETS OFF: Profile (4 pages)

Targeted agency

Main contact

Demographics

Special requirement

Context

Profile 1 Should go to Agency XX	Mary Jhonson May 14, 1944 ssn: 9993
Female	City: Tiffin
No Kids	Population: 2,300
Not Currently Employed (Disabled)	ZIP code: 52340
Married	Phone number: (319) nnn-mmmm
Post Grad or More	Email: mj1944@gmail.com
$25-50k	Closest casino:
72 years	Riverside Casino & Golf Resort
Small Town (<5,000)	
	Callers Need: -Crisis? -Counseling? -Group?
Non-Hispanic	-DK?

BETS OFF: Profile (cont.)

Behavior

| Gambling	Frequency
Bet or wagered on games of personal skill such as pool, bowling, or playing basketball?	One to three times a week
Bet or wagered on card games with friends, family or others but not at a casino	One to three times a week
Bingo	One to three times a week
Online gambling using the internet such as Texas Hold'em Online lsots, online betting, etc?	Once a week
Raffle tickets including those in support of a charitable cause?	Once or twice a year

Reason for gambling

Reason for gambling	
To distract myself from everyday problems	Very Important
To support worthy causes	Somewhat important
For socializing	Very Important
For excitement or as a challenge	Important
Comorbid	
Mental health condition: depression	Yes

No included

Suicide ideation or attempt	Special protocol
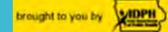
BETS OFF: Profile (cont.)

Problem Gambling

Problems	
Preoccupied with gambling (i.e. reliving past gambling experiences, planning the next venture, or thinking of ways to get money with which to gamble)	Yes
Secretive about his/her gambling habits, and defensive when confronted	Yes
Increasing bet amounts when gambling in order to achieve the desired excitement	Yes
Trying unsuccessfully to control, cut back or stop gambling	No
Gambling to escape problems	Yes
Chasing losses with more gambling	Yes
Lying to family and others about the extent of gambling	No
Committing crimes to finance gambling	No
Jeopardizing or losing relationships, jobs, education or career opportunities because of gambling	No
Relying on others to bail him or her out to relieve a desperate financial situation caused by gambling	Yes

BETS OFF: Profile (cont.)

Casino names and locations

Limitations of Simulated Client Call Evaluation Method

Limitations

-There is always a subjective assessment in the evaluation

-It cannot recreate all the scenarios
- There are only a set of scenarios that can be tested consistently

-There are problems beyond our control in the system
- Cellphone-only households
- Telephone area codes used for directing callers

-This is best when it is an ongoing effort, but it could be hard to sustain this kind of project

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