# COVID-19 Vaccine Ambassador Toolkit

Equipping Patients and Staff as Trusted Messengers to Increase COVID-19 Vaccine Uptake



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## What is in the toolkit?



How-To Guide

Step-by-step instructions on how to implement vaccine ambassador intervention for vaccinated patients and clinic staff



SMS Template

Examples in English and Spanish of tailored texts for vaccinated patients to send to unvaccinated friends and family



#### Flier Template

Examples in English and Spanish of fliers that can be distributed at your vaccination site



#### Script Template

Examples of tailored scripts in English and Spanish that your clinic staff can use when conducting outreach

## **Our Partnership**



#### About Mary's Center

Mary's Center is a federally qualified health center serving nearly 60,000 people of all ages, incomes, and backgrounds via 5 health centers in the Washington, DC metro area for over 30 years. With an integrated model of health care, education, and social services, Mary's Center offers each participant individualized care on the path toward good health, stability, and economic independence. They serve 70% of their participants in a language other than English and have over 800 staff members.



#### **About Surgo Ventures**

<u>Surgo Ventures</u> is a DC-based non-profit dedicated to solving health and social problems with precision. We do this by bringing together all the tools available from behavioral science, data science, and artificial intelligence to unlock solutions to improve and save lives. We work globally: in the United States, the United Kingdom, and in low- and middle-income countries on COVID-19, tuberculosis, maternal and child health, housing, and more.

#### How we worked together

Surgo Ventures partnered with <u>Mary's Center</u>, a DC-based federally qualified health center, to develop a successful vaccine ambassador program based on rigorous behavioral science research (<u>featured in the NYTimes</u>) to provide vaccinated participants and staff with the tools to conduct personalized outreach in their communities. Participants, referred to as vaccine ambassadors, were given a \$20 dollar gift card incentive to either text at least one unvaccinated friend or family member or to bring an unvaccinated person to the clinic. Staff were given a set of tailored scripts to use when reaching out to participants for other health services. Over 200 additional people got vaccinated from the 2-month pilot that equipped 320 vaccine ambassadors.

## The Problem

Nearly 15% of the US adult population have not received their first dose of the COVID-19 vaccine, and that percentage varies greatly based on the state and county you live in. People aren't getting vaccinated for a variety of different reasons from lack of access to concerns about the safety of the COVID-19 vaccine. Health clinics need a precise approach using trusted messengers to reach and encourage unvaccinated people in their communities to get the vaccine and address their questions and concerns.

## Why use this toolkit?

If your community is struggling with low vaccination rates, this toolkit can help you implement two interventions using insights from behavioral science to train vaccinated individuals to serve as vaccine ambassadors conducting personalized outreach. There are numerous outreach methods to reach unvaccinated people being implemented at different clinics. These interventions, backed by behavioral science research, tap into your patients' network and leverage their existing, trusted relationships to have conversations about COVID-19 vaccination. This toolkit will allow your health clinic to implement interventions that:

- Empower and encourage people to have better conversations with friends and family on the COVID-19 vaccine
- Provide staff members with behavioral science-based scripts to use in interactions with unvaccinated patients
- Promote vaccine uptake in your community

This toolkit was designed based on rigorous academic research and a pilot intervention conducted by Surgo Ventures and Mary's Center as described above.

## **Promising Intervention**

Research has shown that trusted messengers such as providers, friends, and family are one of the best ways to reach individuals unsure of vaccination. This outreach is even more effective when it's tailored to address an unvaccinated person's specific concerns.

Based on extensive behavioral science research featured in the NYTimes, Surgo Ventures <u>identified</u> <u>four types of people, or vaccine personas, holding us back from full vaccination</u>. These vaccine personas are defined by their attitudes, behaviors, and personal circumstances. Each type of individual requires different messages and solutions to overcome their barriers toward getting the vaccine. For these interventions, we added an additional persona for those who have already had COVID-19 and are hesitant to get the vaccine because they think they have immunity already or other reasons. For more information see Surgo's report <u>*The Challenge of our Time*</u> or scroll through our <u>vaccine personas explainer</u>. You can view the breakdown of the vaccine personas at the state-and county-level see <u>Surgo's dashboard</u>.

Two complementary interventions have shown promising results for increasing vaccination that utilize both community members and health care workers as vaccine ambassadors. Both interventions build upon the research to conduct tailored outreach informed by these four types of people and their barriers to vaccination.



### Intervention 1: Equipping Vaccinated Patients as Vaccine Ambassadors

Patients are very likely to know others in their community that remain unvaccinated. This intervention empowers vaccinated patients with information on how to talk to their friends and family, and encourages them to do it during a time when their vaccination experience is very salient - right after they get the vaccine. The combination of incentivizing vaccinated patients to start conversations with the unvaccinated people in their life using text messages tailored based on behavioral science research enables health centers to reach new people via trusted channels.



We have developed a set of five tailored text messages: one for each of the four personas and an additional one for people that have already had COVID-19. This intervention encourages people who are in their 15-minute waiting period after receiving their COVID-19 vaccine to text a tailored message to at least one unvaccinated family member or friend. To make it as easy as possible, staff at the vaccine clinic hand out fliers to patients that have five QR codes that they can scan based on the type of concern their unvaccinated peer has: whether it's that they don't have the money or time or not sure the vaccine is safe. Upon scanning the QR code, the tailored SMS text pre-populates on their phone for them to send that includes specific language that addresses their concern and provides information on how to get vaccinated at your clinic. The flier also contains guidance for how to write a text if the patient can't scan the QR code. This process starts a two-way conversation that can be a powerful catalyst for driving vaccination.

Once a patient shows proof that they've sent at least one text, they are given a \$20 gift card to a store of your choice - we found Target works best - from your staff at the clinic. A complementary approach is to tell vaccinated patients that they will receive a \$20 gift card for each unvaccinated person they bring to the clinic which works well in patients who are uncomfortable or unable to use text messages.

#### Go to step-by-step implementation guide.

#### Intervention 2: Equipping Clinic Staff as Vaccine Ambassadors

Clinic staff and healthcare professionals are trusted by patients though not always trained in how to have science-backed conversations around COVID-19 vaccination in simple language. This intervention provides your clinic staff with a behavioral science-backed resource for having conversations with patients whether it's reaching out to schedule a physical or helping them check-in for their appointment. We have developed a set of five scripts - one for each of the four personas and one for people that have already had COVID-19 - that your staff can refer to when having a conversation with patients in-person or over the phone. You can provide your staff with printed or digital versions of the script and encourage them to use it. The template includes three columns: the concern the patient has, what to emphasize when speaking to the patient, and a sample script. Clinic staff are welcome to read from the sample script or create their own using the "Emphasize" column.

Go to step-by-step implementation guide.

# How to Implement Vaccine Ambassador Intervention: A Step-by-Step Guide

## Intervention 1: Equipping Vaccinated Patients as Vaccine Ambassadors

This intervention can be easily adapted to any vaccination clinic. The key components include development of outreach materials, training your team, securing incentives, and most importantly engaging with vaccine ambassadors. This intervention equips people as vaccine ambassadors by providing them with a tailored approach and language backed by behavioral science to engage with unvaccinated friends and family.

#### Set-Up

#### Develop Outreach Materials

- See the Appendix for example text messages, fliers, and QR code instructions.
- Review and personalize the template text messages: Edit the template text messages to include the context of your clinic. If desired, secure translations of the text messages based on your clinic population. We had materials in English, Spanish, and Amharic based on the population we were targeting.
- Create the QR codes to allow people to scan and auto-populate text messages: Use <u>Flowcode</u> or another QR service. Flowcode allows you to track the number of scans for evaluation purposes and works for both iPhone and Android devices. If using Flowcode, select SMS as the scan destination. Enter 123456789 as the phone number, patients can change this once they scan. Paste in the first text message. Name your Flowcode based on the persona. Press create my Flowcode. Repeat for all the text messages, and then download the QR codes. For more detailed QR code implementation instructions, <u>see Appendix</u>.
- Design fliers to include the QR codes: Use the <u>flier template</u> as a guide. These fliers can be adjusted to reflect information for your clinic. Include your organization's logo, details on incentives, and your own QR codes. The fliers should also include bulleted guidance on how to compose a text message for those that can't scan the QR codes. Print the fliers and make sure that the QR code is large enough to scan. Test with a few different devices to ensure scanning capability is consistent.
- Determine workflow in your clinic and identify staff who are responsible for handing out the flyers, confirming referrals, and handing out gift cards
- Track referrals

#### Purchas Incentives

Gift cards are critical to incentivize vaccinated patients to engage as a vaccine ambassador and reach out to their unvaccinated friends and family. Choose the type and amount for the gift card based on your understanding of your patient population. You could provide gift cards to the local grocery store or retail company. We recommend \$15-\$20 gift cards. You can start by purchasing 50-100 gift cards and secure more as needed. You can also experiment and obtain gift cards from different places to see which people prefer. You may be able to secure gift card donations by sharing about the program to vendors or funders.

#### Implementation

#### Staff leadership

Buy-in for the intervention across your clinic is important for success. We recommend engaging staff across the clinic as champions of the intervention. Our team included the COVID Response Project Manager, the Chief Nursing Officer, the Vice President of Marketing and Communications, and the Communications Manager.

#### Train staff at vaccine clinics and engage patients

- Share the details behind the program with your clinic team members and train staff in the research behind the program and why it is effective in increasing vaccination.
- Provide team members with the fliers and gift card incentives.
- Staff should share the opportunity with vaccinated patients and should award patients with the gift card incentive if they text at least one unvaccinated peer. Ideally, this outreach occurs either right before or right after the patient receives their vaccine, so they can send out the text during their 15-minute post-vaccination wait period. The more enthusiastic and focused the team is on the intervention, the more likely for it to be successful and for vaccinated patients to engage.
- We also rewarded vaccine ambassadors with a gift card if they brought a friend or family member to get vaccinated.
- The program should be a low burden on staff, with the primary responsibilities being educating patients on the program, distributing incentives by monitoring text messages sent, and tracking the number of people who send text messages and people who bring someone into the clinic for vaccination.

#### Evaluation

If you are interested in tracking the impact of the program, you can use the following metrics:

- Record number of gift cards handed out. Ask your clinic staff to record if the person texted someone or brought a friend
- Track number of QR code scans through the Flowcode dashboard
- Tracking referrals by introducing a short questionnaire

### Intervention 2: Equipping Clinic Staff as Vaccine Ambassadors

This intervention equips clinic staff who are engaging with patients daily with tailored language backed by behavioral science to encourage unvaccinated patients to get vaccinated by addressing their questions and concerns.

#### Set-Up

**Review and personalize the** <u>template script</u> to include the context of your clinic. The Appendix includes a set of five scripts - one for each of the four personas and one for people that have already had COVID-19 - that your staff can refer to when having a conversation with patients in-person or over the phone.

#### Implementation

Distribute the scripts (printed and/or digital) to your outreach teams and provide training on how to use the scripts as well as context on the research and why this approach is effective. The template includes three columns: the concern the patient has, what to emphasize when speaking to the patient, and a sample script. Clinic staff are welcome to read from the sample script or create their own tailored messages using the "Emphasize" column. Encourage staff to personalize the scripts as needed based on their patient conversations.

#### Evaluation

Check in periodically with the outreach teams to receive feedback on the scripts and the responses they are hearing from patients they communicate with. Continue to assess and make changes as you receive feedback from staff.

## FAQs

#### What if my patients can't scan the QR code?

While the QR codes we used are designed for most iPhone, Androids, and other smartphones, we know not all phone cameras have QR code capabilities. We included a set of bullet points at the bottom of the flier that people could use to guide their outreach texts to friends and family. You can also encourage patients to bring a friend or family member when they come for a second dose and get the incentive that way.

#### How do I adapt these materials for my patient population?

We have provided templates below for texts, scripts, and fliers. For the texts and the scripts, we have added brackets where you can enter the name of your clinic and clinic specific information. We also recommend that you translate the materials into the main languages spoken by your patient population. For Mary's Center, we translated materials into Spanish and Amharic.

#### What type of gift card and amount should I choose?

The type of gift card and amount depends on funding availability and the type of incentive that people in your community would be most interested in. We recommend gift cards that are \$15-20 dollars and choose a versatile gift card option like Target or Safeway (local grocery store chain).

#### Why are there no texts and scripts for Enthusiasts?

We chose not to include texts and scripts for Enthusiasts since they are most likely to get vaccinated, and therefore would benefit less from personalized outreach.

# Appendix

#### Materials for Intervention 1

- <u>SMS Text Template English</u>: This template provides examples of tailored texts in English that patients can pre-populate on their phone when scanning the QR code. Each of the five texts addresses different concerns experienced by each type of unvaccinated person and provides a link to your website's vaccination page. Fill out the orange bracketed text to personalize for your clinic.
- <u>SMS Text Template Spanish</u>: This template provides examples of tailored texts in Spanish that patients can pre-populate on their phone when scanning the QR code. Each of the five texts addresses different concerns experienced by each type of unvaccinated person and provides a link to your website's vaccination page. Fill out the orange bracketed text to personalize for your clinic.
- <u>Flier Example Front and Back English:</u> These are examples of the English fliers we developed for the Mary's Center intervention. You can use these as a model for your fliers, making sure to include the following: call to action, incentive announcement, QR codes and corresponding labels, and sample bullets to use if the QR codes won't scan.
- <u>Flier Example Front and Back Spanish</u>: These are examples of the Spanish fliers we developed for the Mary's Center intervention. You can use these as a model for your fliers, making sure to include the following: call to action, incentive announcement, QR codes and corresponding labels, QR code scanning instructions, and sample bullets to use if the QR codes won't scan.
- <u>How to Use Flowcode</u>: This brief how-to guide talks through how to create the QR codes on Flowcode that scan and pre-populate SMS text messages. These QR codes can be downloaded and put on the fliers.

#### Materials for Intervention 2

• <u>Script Template – English:</u> This template provides examples of tailored scripts in English that staff can use to guide their conversations with unvaccinated patients. The "Emphasize" column provides bullets that staff can use to craft their own script. This template is structured so it's ready to print and hand out once you fill out the orange bracketed text to personalize for your clinic.

## Vaccine Ambassador Text Message Template – English

This template provides examples of tailored texts in English that patients can pre-populate on their phone when scanning the QR code. Each of the five texts addresses different concerns experienced by each type of unvaccinated person and provides a link to your website's vaccination page. Fill out the orange bracketed text to personalize for your clinic.

Persona	Examples	
If they're still gathering information (Watchful)	Hey! I just got my COVID-19 vaccine today at [insert clinic name]. The process was quick, easy, and free. Lots of people here are getting the vaccine. They said they haven't seen any safety issues so far. I know you're considering getting it. When are you planning to get it? Here is a link to [insert clinic name]'s website with more info: [insert website]	
If they're not sure if they have the money or time (Cost-Anxious)	Hey! I just got my COVID-19 vaccine today at [insert clinic name]. It only took me 15 minutes, was completely free, and they didn't ask me for any information. When are you planning to get it? Here is a link to [insert clinic name]'s website with more info: [insert website]	
If they're not sure if the vaccine was developed safely for them (System Distruster)	Hey! I just got my COVID-19 vaccine at [insert clinic name]. They answered all my questions about the vaccine's safety before I took it. The process was quick, easy, and free. When are you planning to get it? Here is a link to [insert clinic name]'s website with more info: [insert website]	
If they're highly skeptical of the vaccine (COVID Skeptic)	told me that any vaccine risk was way lower than the risk of long COVID	
f they've already had COVID Hey! I just got my COVID-19 vaccine at [insert clinic name]. Just war to let you know that even though I know you had COVID-19, appare the vaccine can help reduce long COVID symptoms and reduce your chances of getting COVID again. When are you planning to get it? H is a link to [insert clinic name]'s website with more info: [insert website		

## Vaccine Ambassador Text Message Template - Spanish

This template provides examples of tailored texts in Spanish that patients can pre-populate on their phone when scanning the QR code. Each of the five texts addresses different concerns experienced by each type of unvaccinated person and provides a link to your website's vaccination page. Fill out the orange bracketed text to personalize for your clinic.

Persona	Examples	
If they're still gathering information (Watchful)	Oye! Acabo de recibir mi vacuna COVID-19 hoy en [nombre de la clínica]. El proceso fue rápido, fácil y gratuito. Mucha gente aquí está recibiendo la vacuna. Dijeron que no han visto ningún problema de salud hasta ahora. Sé que estás pensando en ponértela. ¿Cuándo planeas hacerlo? Aquí hay un enlace al sitio web de [nombre de la clínica] con más información: [insert website]	
If they're not sure if they have the money or time (Cost-Anxious)	Oye! Acabo de recibir mi vacuna COVID-19 hoy en [nombre de la clínica]. Solo me tomó 15 minutos, fue completamente gratis y no me pidieron ninguna información. ¿Cuándo planeas ponértela? Aquí hay un enlace al sitio web de [nombre de la clínica] con más información: [insert website]	
If they're not sure if the vaccine was developed safely for them (System Distruster)	Oye! Acabo de recibir mi vacuna COVID-19 en [nombre de la clínica]. Respondieron todas mis preguntas sobre la seguridad de la vacuna antes de que la tomara. El proceso fue rápido, fácil y gratuito. ¿Cuándo planeas ponértela? Aquí hay un enlace al sitio web de [nombre de la clínica] con más información: [insert website]	
If they're highly skeptical of the vaccine (COVID Skeptic)	Oye! Acabo de recibir mi vacuna COVID-19 en [nombre de la clínica]. El médico me dijo que cualquier riesgo de vacunación era mucho menor que el riesgo de COVID prolongado o de la nueva variante. Dijeron que hasta ahora no han visto ningún problema de salud con sus pacientes con la vacuna. ¿Cuándo planeas ponértela? Aquí hay un enlace al sitio web de [nombre de la clínica] con más información: [insert website]	
If they've already had COVID	Ilready had Oye! Acabo de recibir mi vacuna COVID-19 en [nombre de la clínica]. Solo quería hacerte saber que, aunque sé que tuviste COVID-19, aparentemente la vacuna puede ayudar a reducir los síntomas prolongados de COVID y reducir tus posibilidades de contraer COVID nuevamente. ¿Cuándo planeas ponértela? Aquí hay un enlace al sitio web de [nombre de la clínica] con más información: [insert website]	

## Vaccine Ambassador Flier Template - English Front



# Get a \$20 gift card by texting 3 people now about the vaccine

See Mary's Center staff to claim

# Not sure what to text them?

Flip this flyer over and hover over the QR codes on the back to get a personal SMS to send

## Vaccine Ambassador Flier Template - English Back



## Vaccine Ambassador Flier Template - Spanish Front



Obtenga una tarjeta de regalo de \$20 enviando ahora un mensaje de texto a 3 personas sobre la vacuna

Consulte al personal de Mary's Center para reclamar la tarjeta

¿No sabe qué mensaje de texto enviarles? Dale vuelta a este papel y coloca su cámera sobre el código QR para las diferentes opci<u>ones</u>

## Vaccine Ambassador Flier Template - Spanish Back

Coloca la cámera sobre el código QR para ver el texto



# Si **todavía están** recopilando información

Si **no están seguros de** tener el dinero o el tiempo





Si **no están seguros de que la vacuna sea segura** 

Si **son muy escépticos sobre la vacuna** 





Si **ya han tenido** COVID-19

¿No puedes escanear el QR? Usa algunos de estas ideas

- Hágales saber que el proceso fue rápido, fácil y gratuito
- Todas las vacunas COVID-19 son seguras y protegen contra COVID prolongado y la nueva variante Delta
- Envíeles el enlace para inscribirse en una cita: bit.ly/maryscentervaccine

## How to Use Flowcode



## Vaccine Ambassador Script Template

As you're reaching out to patients, it's a good opportunity to ask them if they're vaccinated and answer any questions they might have. People have a variety of reasons for not getting the vaccine yet. The scripts below provide targeted responses for five potential reasons, allowing you to guide your conversation using insights from behavioral science. Depending on what the patient says, you can use the information from the corresponding row. Feel free to read from the example or create your own script based on the bullet points in the "Emphasize" column.

Staff member: Hey [insert name]! Have you gotten your COVID-19 vaccine yet?

- If yes: Awesome! Have all your family and friends gotten vaccinated?
  - If no, provide them with information on [insert name of your clinic here] vaccine clinics.
- If no: What's on your mind?

If	Emphasize	Example
they're still gathering information:	<ul> <li>Safety</li> <li>Positive experiences</li> <li>Social norms</li> <li>COVID-19 risk</li> <li>Anticipated regret</li> </ul>	Just like with any other treatment or procedure, we looked at all the information on the COVID-19 vaccine to make sure it was safe for our patients. We believe getting the COVID-19 vaccine is the best way to prevent COVID- 19 and its potential long-term complications. We've vaccinated 20,000 people in our clinics, and we haven't seen any concerning health issues. Can I send you a link to book an appointment?
they're not sure if they have the time or money:	<ul> <li>Vaccine is free</li> <li>Vaccination is quick and convenient</li> </ul>	I know it's hard to find the time to get the vaccine. At [insert clinic name] we're offering vaccines every day at all our locations. You come in; we don't ask you for any details. The vaccination takes less than 30 seconds and then we observe you for 15 minutes - it's routine, good practice - just to make sure everything is ok. It's completely free, we don't ask for insurance or copays. In the next couple of days, what is the best time for you to get the vaccine? Can I send you a link to book an appointment? I can also call you and help you book something or remind you to head over to the site. If immigration status comes up: The vaccine is available to anyone, regardless of the immigration status. Our staff never asks for documents.

If	Emphasize	Example
they're not sure if the vaccine was developed safely for them:	<ul> <li>Safety and efficacy</li> <li>Talk about your own experience</li> <li>Social norms</li> <li>Responsibility not to get family + community sick</li> </ul>	We prioritize your health and safety. Whenever we suggest something to patients, we only do it once we've done the research ourselves. We are recommending you get the COVID-19 vaccine. We haven't seen any health concerns with any of the 20,000 people we've vaccinated. I got the vaccine myself after doublechecking on <b>[PT concern]</b> Just like any other vaccine, the COVID-19 vaccine helps protect you and your community. No shortcuts were taken in developing the COVID-19 vaccine - it is built on years of research. Can I send you a link to book an appointment?
they're highly skeptical of the vaccine:	<ul> <li>Doctor's advice</li> <li>Risk of novel variants and long COVID</li> <li>Care for their health</li> </ul>	I know there's a lot of information out there, and I'm guessing you're the type of person that does a lot of research. Like with any other medical conditions, our doctors took a close look at the data to make sure that the vaccine was safe for our patients. We've given [insert <b># of given</b> ] vaccinations through our clinics and haven't seen any major issues. We respect your decision not to get the vaccine, but if there's anything we can do to help address your concerns, please let us know. We care about your health and strongly recommend you get the vaccine. Like any other disease, it can get fatal quickly. We've also seen that nearly 10% of people get long COVID. You've been lucky if you've avoided it so far. Over 50% of the population has gotten the vaccine, so it's been proven to be quite safe. Can I send you a link to book an appointment?
they've gotten COVID-19 and don't think they need the vaccine:	<ul> <li>Immunization reduces long COVID-19 symptoms</li> </ul>	I'm glad that you recovered from COVID-19. However, there is no telling when your natural immunity will be too low to fight COVID. The vaccine can actually boost your immunity to much higher levels and for a much longer period of time. Additionally, the vaccine can help alleviate long COVID symptoms. A recent study found that 30-40% of people with long COVID who got the vaccine felt better. No more brain fog, loss of smell and taste, or fatigue. Can I send you a link to book an appointment?