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

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Support & Disclaimer

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The views expressed here are those of the author(s) and do not necessarily reflect the positions or policies of the Division of Tobacco Use Prevention and Control, Office of Gambling Treatment and Prevention, or the State of Iowa.
Overview of design components of Simulated Client Call evaluation
Implementation of Quitline evaluation
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

- 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

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

- Primarily used in:
  - Business
  - Community planning
  - Emergency call centers
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 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
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
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)
Caller Profiles

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

- NRT medication delivery
- Special populations
- Web-based coaching program
- Remove profile contact info from follow-up evaluation sample
- Evening/after hours 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

### Ideal

<table>
<thead>
<tr>
<th>February</th>
<th>March</th>
</tr>
</thead>
<tbody>
<tr>
<td>2/13 - 2/17</td>
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<tr>
<td>Devon Wesley</td>
<td>FU1#--AM</td>
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<tr>
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<tr>
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</tr>
<tr>
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</tr>
<tr>
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</tr>
<tr>
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### Realistic

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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
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
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
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
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

- 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
- **Ultimate goal**: Improve the public service
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
Let’s design the project
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)
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

Problem Gambling Treatment Providers

Caller from Marshall county
1-800 BETS OFF Referrals (FY 2016)
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?
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?
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
CSBR caller’s check list

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

<table>
<thead>
<tr>
<th>BETSOFF requirements by IDPH contract</th>
<th>Poor</th>
<th>Fair</th>
<th>Good</th>
<th>Very Good</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>With the agency staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Thinking back on the call, rate your overall impressions of the call</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
BETS OFF: Profile (4 pages)

Profile 1
Should go to Agency XX

Mary Jhonson
May 14, 1944
ssn: 9993

Demographics

- Female
- No Kids
- Not Currently Employed (Disabled)
- Married
- Post Grad or More
- $25-50k
- 72 years
- Small Town (<5,000)
- Non-Hispanic

Targeted agency

Main contact

City: Tiffin
Population: 2,300
ZIP code: 52340
Phone number: (319) nnn-mmmm
Email: mj3944@gmail.com
Closest casino: Riverside Casino & Golf Resort

Callers Need:
- Crisis?
- Counseling?
- Group?
- DK?

Special requirement

Context
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 slots, online betting, etc? Once a week
Raffle tickets including those in support of a charitable cause? Once or twice a year

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

Suicide ideation or attempt Special protocol
### Problem Gambling

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


