

INSTRUMENT 1

Recruitment Call Script

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Early Care and Education Leadership Study (ExCELS) Recruitment Call Script

Goals of the call:

- A. Introduce yourself
- B. Describe the purpose of the study
- C. Give an overview of the study activities
- D. Invite the director to participate
- E. If the director agrees to participate, schedule the engagement interview

A. Introduction

Hello [CENTER DIRECTOR'S LAST NAME], my name is [LIAISON'S NAME], and I'm calling from Mathematica about your center's participation in the Early Care and Education Leadership Study, or ExCELS for short. It's funded by the Office of Planning, Research, and Evaluation in the Administration for Children and Families, which is part of the U.S. Department of Health and Human Services. We recently sent you an email and letter saying that your center had been selected to be part of this study. We included a fact sheet with information about the study, and a brochure. Did you receive these materials, and if you did, have you had a chance to go over them?

[Have the letter available to provide information if the person is not familiar with the study.]

The Administration for Children and Families asked Mathematica and the Institute for Early Education Leadership and Innovation at the University of Massachusetts Boston to conduct ExCELS, which is an important study that will collect information about leadership in early care and education centers.

I'd like to give you a brief overview of the study and answer any questions you might have. This call should only take about 20 minutes.

Is now a good time to talk?

[If it isn't a good time to talk, make an appointment to call later.]

Before we get started, let me read you the following statement for your information: "Your participation is voluntary. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number. The OMB number for this information collection is XXXX-XXXX and the expiration date is MM/DD/YYYY."

B. Study purpose

First, I'd like to quickly tell you about the study. Leadership is important to how early care and education centers provide services to children and families. But, we don't know a lot about how leadership works in centers and who participates in making decisions. The Early Care and Education Leadership Study (ExCELS) will help the early childhood field learn about the ways that center directors, managers and teaching staff contribute to decisions and practices that support quality. Through this study, we will gather information from many points of view to understand staffing and participation in leadership across a range of centers. And because we are interested in learning about leadership from many points of view, the study includes two surveys—one for center managers and one for teaching staff. This will help us gain a full picture of how leadership works across a range of centers.

C. Overview of study activities

I also want to describe the activities included in your center's participation in the study. We'd work closely with you and other staff at the center to limit any disruption by participating in this study and we plan to offer centers that participate a \$150 check. We'd like to conduct a few activities with your center as part of this study including:

- A short, 20-minute telephone interview with your center's primary site leader, or the person in the building who is responsible for oversight of all that happens in the center on a daily basis, to get some basic information about the center to help us confirm the center is eligible for the study.
- A 30-minute telephone interview with the primary site leader to get some information about your center's staffing structure and leadership positions. During that interview we'd also ask for staff contact information to help us determine who should complete the surveys.
- A survey for some managers and all teaching staff to complete. The survey will help us learn about the people in your center who make decisions about what happens in the center, center operations, how staff work together in the center, and how the center works with families and the community. To show our appreciation, we'll offer a \$25 gift card to center managers who complete a 25-minute survey, and a \$50 gift card to teaching staff who complete a 60-minute survey.
- **[IF ON-SITE VISIT GROUP:** Finally, we would like to send a study representative to visit your center to invite staff to complete the survey, and distribute the gift cards for completed surveys. We expect the visit to take about four hours each day on two different days within a week.]

I also wanted to let you know that taking part in this study is voluntary. The purpose of this study is to learn about leadership in early care and education centers. There are no risks or direct benefits from taking part in the study. We will use the information the study collects only for research purposes and in ways that will not reveal who you are or identify your center or its staff. We have a certificate of confidentiality from the National Institutes of Health. It helps us protect your privacy. This means no one can force the study team to give out information that identifies the center or its staff, even in court. However, in some cases federal or state laws might require us to show information to government officials or sponsors who monitor the safety of the study. Publications about the study will not identify anyone from the center. Nor will they identify the center itself. We will share some of the data the study collects with qualified individuals for research purposes. Nothing we share will identify people or specific centers. If you have questions about ExCELS, please contact Annalee Kelly, the survey director, at [STUDY PHONE] or by email at [STUDY EMAIL].

We value your time and the center staff's time, and we'd appreciate any help you can give us by participating in this important study. We have extensive experience working in centers, and we understand the need for flexibility and making efficient use of everyone's time.

Do you have any questions about the study's purpose, any of the activities I described, or any concerns about your center's involvement in the study?

D. Confirm center participation

Would you be willing for your center to participate in this important study?

- ***[If the answer is YES.]***

That's great. Thank you, we're excited about working with you!

[IF ON-SITE VISIT GROUP: At this time, are you planning to allow visitors on-site this spring between the months of March and May?]

[Document response and continue to Section E.]

- ***[If the answer is MAYBE, or if the center director needs more time to decide.]***

Thank you for taking the time to speak with me today and for considering this request. We appreciate it. I'm always happy to answer any questions or concerns you might have. Are there any specific concerns that come to mind right now that we could talk about?

[Use the list of concerns in Table 1 below to help determine what their concerns are, then use the responses to address the concerns.]

When would be a good time for us to check in about your center's participation in the study?

And please, if you have any questions, feel free to contact me at [LIAISON PHONE] or by email at [LIAISON EMAIL].

[Thank the director, end the call, and document the discussion.]

- ***[If we need permission to participate from an umbrella organization.]***

Thank you for taking the time to speak with me today. Who would be the best person at that organization for us to ask about your center's participation in the study?

[Collect name, phone, and email/ mailing address.]

[Thank the director, end call, and document discussion.]

- ***[If the answer is NO, or if the center director is hesitant.]***

I'd like to better understand why you are hesitant to participate. What are some of the concerns you have?

[Use the list of concerns in Table 1 below to help determine what their concerns are, then use the responses to address the concerns.]

[Continue to respond to concerns as needed. If the respondent agrees, continue to Section E.]

[If answer is still NO, thank them for their time and end the call.]

Table 1. Responses to concerns about participating

Concern	Response
Is the time involved or the number of activities one of your concerns?	<i>Reiterate the study's flexibility in scheduling a convenient time for data collection. Explain that the activities are broken up over time, so it's never a lot at once. Explain that staff will have plenty of time to complete the surveys.</i>
IF ON-SITE VISIT GROUP: Is the visit a concern?	<i>Reiterate that we will be flexible in scheduling the visit, and that our field staff will be there only to invite staff to complete the surveys and to distribute gift cards.</i>
IF ON-SITE VISIT GROUP: Is field staff security a concern?	<i>Mention that field staff will not be interacting with children. Explain more about field staff hiring and screening: "To ensure the safety of our field staff and study participants, Mathematica's hiring policy requires all newly hired and rehired field staff to pass a criminal background check. We'll provide documentation of field staff clearances upon request."</i>
IF ON-SITE VISIT GROUP: Are you not allowing visitors at your center because of the COVID-19 pandemic?	<i>Ask the center director what they would feel comfortable doing. Mention that you will speak with your supervisor to see if the study can come up with more tailored procedures for their center depending on their center's current restrictions.</i>
Do you have concerns about the study's purpose? Do you have any additional questions about the study?	<i>Give more explanation about the study's purpose, and answer any questions they have.</i>

E. Schedule the engagement interview

For the next step, I'd like to talk with your center's primary site leader, or the person in the building who is responsible for oversight of all that happens in the center on a daily basis, to collect some basic information about the center. Is that you, or is there someone else I should talk with?

- *[If it is the primary site leader, ask if they have another 20 minutes to collect some basic center information and then continue to the Center Engagement Interview Guide, or schedule a follow-up call with the primary site leader to conduct the center engagement interview.]*
- *[If it is not the primary site leader, ask for the name and contact information of the primary site leader. Try to schedule the engagement interview with the primary site leader while on the phone with the current respondent.]*