

# Fall 2023 Medicare Current Beneficiary Survey (MCBS) Expanded Outreach Efforts

## Overview

In Fall 2023, the CMS Office of Enterprise Data and Analytics (OEDA) and the CMS Office of Minority Health are piloting enhanced outreach to sampled Medicare beneficiaries who are likely to identify as Hispanic, Black, or Asian, based on information from administrative records, with the goal of improving response among these historically under-represented groups. Specifically, we are testing several efforts to better identify and promote participation among these beneficiaries:

1. Using administrative data, identifying sampled beneficiaries who are likely to identify as Hispanic, Black, or Asian. These beneficiaries will receive additional outreach, including in-person contact attempts.
2. Recruiting additional interviewers in geographic areas with greater likelihood of sample among these groups, to facilitate more in-person outreach.
3. Updating interviewer training materials to improve content on culturally responsive research, addressing specific concerns and barriers, and other strategies to improve response among underserved populations.

CMS will closely monitor the success of outreach and interviewing strategies and data collection progress amongst underserved minority groups. Analysis of response rates, level of contacting effort required to complete interviews, modes of outreach and mode of completed interviews will inform future efforts to expand the data available for underserved Medicare beneficiaries. Additional information on enhanced outreach materials and data collection protocol planned for the Fall 2023 survey is described below.

## Data Collection Activities

Using enhanced data collection techniques may be an effective means of increasing survey participation and retention among historically underserved populations. Up to this point, efforts to improve response among racial or ethnic groups has been limited to an oversample of Hispanic beneficiaries, and occasional efforts to increase outreach to those beneficiaries. As CMS' contractor for the MCBS, NORC is conducting the following activities in support of expanded data collection outreach for underserved populations:

1. Interviewer Recruitment and Training
  - a. Recruit and add approximately 20 field interviewers to the existing MCBS interviewing staff with specific geographic areas in mind. The Primary and Secondary Sampling Units already defined for the MCBS will determine these geographic areas. These targeted recruitment areas will be focused on communities with high concentrations of underserved populations.
  - b. Improve interviewer training materials to highlight culturally responsive engagement and interactions with underserved populations. Interviewers will learn to understand and respond to a variety of culturally specific issues or concerns that respondents might

have. Interviewers will also receive training on “best practices” for verbal and non-verbal communication, such as attending to and being respectful of how someone introduces themselves or being mindful whether certain days/times are more appropriate to contact a respondent. Frequently Asked Questions (FAQ), job aids, and role-playing scripts will be used to reinforce methods for interviewers to use.

- c. Train interviewers to implement the tailored outreach strategies and techniques. They will also receive training on cultural awareness and sensitivity to equip them with knowledge and understanding to interact effectively and appropriately with Hispanic, Black, and Asian beneficiaries.
- d. Provide “refresher” outreach tips through monthly interviewer debriefing and gather interviewer feedback on the outreach strategies via debriefing comments and the Interviewer Remarks Questionnaire that is completed at the conclusion of each interview.

## 2. Respondent Materials

- a. The MCBS respondent materials include an invitation letter mailed to all beneficiaries in both English and Spanish to explain the survey and convey legitimacy (see Attachment 1. Community Materials). The letter includes brochures in both languages as well as an insert with a brief explanatory note in six additional languages indicating that the interview can be completed in English or Spanish.
- b. The MCBS questionnaire is designed to be administered in English or Spanish. Should a beneficiary speak another language, a proxy respondent can complete the interview on their behalf.
- c. Interviewers also have a language identification reference card with more than 20 languages to help them navigate a situation when the beneficiary does not speak English.

## 3. Prioritize In-person Outreach

- a. NORC used information contained in administrative records to identify sampled beneficiaries who are likely to be Hispanic, Black, or Asian. These beneficiaries are prioritized for in-person contact attempts. Since the onset of the COVID-19 pandemic, the MCBS has incorporated mixed-mode data collection using telephone and in-person interviewing modalities. In-person interviewing, compared to telephone interviewing, results in higher survey participation and completion rates particularly among hard-to-reach populations including minority populations. Prioritizing in-person contacting and interviewing will be an important strategy for completing more interviews with underserved populations.