Patient Outreach Messaging Rubric

As part of our efforts to create effective and engaging email messages for our Patient Network, we captured established best practices[i] as well as the ongoing guidance provided by our patient and stakeholder advisors as we worked thought the development process. This resulted in a rubric (below) that can be used to guide the development of future messaging to patient stakeholders and community members.

Must Haves *All messages must…*	Description	Scoring [2] Does this well [0] does not do this
Lead with value to patient or impact of participation	Clearly state "Why" their participation in valuable, what value this brings to patients or the patient community, and/or the impact of their participation.	
Include a clear and measurable call-to-action or objective	Clearly state what the patient is being asked to do. Avoid "insider" terms. Use plain language.	
Include clear detail on time and/or commitment required	Directly reference the time and/or commitment required. For surveys, state the estimated time or number of questions.	
Briefly introduce yourself as the sender.	Share who you are, what role you have, and what organization you represent to begin to build role-based trust (fellow patient, CBO, etc.), organizational recognition, and a personal relationship.	
Be written in accessible language at an appropriate level (avoid jargon, 8th grade reading level, etc.)	Write in clear, concise, and simple language. Use terms that most 8th graders would understand. Use readability tools and ask patient community members to review before sending.	
Use person-centered language	People are more than their condition, disability, or social identity. Always use person-centered to show you respect the unique qualities and strengths of every individual.	

Nice to Have *All messages should try to…*	Description	Scoring [2] Does this well [1] needs improvement [0] does not do this
Be personalized or targeted in some way (community, identity, condition, experience, etc.)	The more personalized the better, your audience should know why you are reaching out to them in particular. Connect based on shared experiences (not labels).	
Build a relationship. Stay engaged.	Build rapport with a series of messaged. Communicate at each step of the project. Follow-up with results even if they did not participate to encourage future engagement (ex: "Here are the results of the last survey we sent," or "Thanks to the 4 patients that agreed to be on our advisory group.").	
Include a relevant image or infographic	Avoid stock photos where possible. Ensure any photos or infographics enhance the message and don't distract from it.	