

# SM Network Leader Engagement & Participant Access Workgroup Meeting

<b>Meeting Date:</b>	February 23, 2015
<b>Meeting Time:</b>	2-2:55pm
<b>Meeting Location:</b>	Teleconference <b>Call in Number: (866) 390-1828</b> <b>Participant code:</b> 860349 Host=OHA: 400520
<b>Facilitators:</b>	Laura Chisholm & Tamara Burkovskaia -- Oregon Public Health Division
<b>Meeting purpose</b>	To establish the new Self-Management Network Leader Engagement and Participant Access Workgroup, identify common goals, objectives and activities.
<b>Attachments:</b>	<ol style="list-style-type: none"> <li>1. Self-Management Network Strategic Objectives</li> <li>2. Leader Engagement &amp; Participant Access – Notes from SM Network meeting on 6/10/14</li> <li>3. 2014 Self-Management Training Needs Survey</li> </ol>

<b>Agenda Item, objective and background information</b>	<b>Time</b>
<p>1. Workgroup Background, Context &amp; Introductions (Laura/Tamara)</p> <p><b>Objective:</b> Provide background information on the workgroup and have callers and facilitators introduce themselves.</p> <ul style="list-style-type: none"> <li>○ Your name</li> <li>○ Your position, organization and role with self-management</li> <li>○ What programs you're involved with</li> <li>○ What you'd like to get out of this group</li> </ul> <p><b>Background:</b> This workgroup is being formed based on input from the June 10, 2014 Network Business Meeting. Initial input indicated interest in establishing a group that will develop tools and provide guidance for self-management organizations and group leaders on how to increase reach and engagement in SM programs and improve program sustainability.</p> <p><b>Discussion:</b> The need for this group was identified at the June 2014 Network Business Meeting, and it will focus on participant recruitment and retention, support of leaders, and decreasing disparities. The following people participated in the first meeting of the group and noted their highest priorities:</p> <ul style="list-style-type: none"> <li>● <b>Bonnie Corns</b> – Yamhill Community Care Organization Project Manager – partnership with community providers, unduplicated resources, get providers on board for referrals.</li> <li>● <b>Melissa Dilley</b>, Providence Medical Group – coordinate Living Well, licensed for Tomando Control; better retention of participants, centralized place for leaders to stay engaged and active.</li> <li>● <b>Jennifer Lund</b> – WVP Health Authority; Living Well, Diabetes SMP, Chronic Pain PSMP, Tomando, Walk With Ease (WWE); streamlining referrals, keeping people in programs after the first week.</li> <li>● <b>Brenda Johnson</b> – Deschutes County Health Department – Living Well,</li> </ul>	2:00-2:15

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<p>Tomando, DSMP, also trained in Diabetes Prevention Program. Open to new recruitment ideas, leader retention and ways to keep them engaged and satisfied.</p> <ul style="list-style-type: none"> <li>• <b>Lauren Champagne</b> – Living Well Coordinator, Rogue Valley Council of Governments; Living Well, CPSMP, Diabetes SMP, Tomando Control, Tomando Diabetes, Powerful Tools, Coleman, Care Transitions. Established partnerships with clinics and funders; looking at how to maintain integrity of intention while funders/providers seeking to motivate clients and follow up on attendance and completion. Responding to requests from medical system while maintaining integrity of programs.</li> <li>• <b>Robin Stalcup</b> (Tobacco Prevention and Education Program) &amp; <b>Shauna Rosetto</b> (Healthy Communities Program) – Douglas County Public Health – helped CCO establish programs, paid for training, yet very small class sizes and problems with retention; need fresh marketing ideas. Sustainability and commitment from the Coordinated Care Organization (CCO).</li> <li>• <b>Sandra Echevarria</b> – Yakima Valley Farm Workers Clinic – retention of participants.</li> <li>• <b>Nora Zimmerman</b> – Grand Ronde Hospital – provides Living Well under Community Connections of NE Oregon license. Getting providers on board, recruiting new participants.</li> <li>• <b>Emily Johnson</b> – Yamhill CCO – not affiliated directly but have partners doing Living Well and Walk with Ease; incorporate CCOs in to the Network, offer programs, learn about recruitment and retention.</li> <li>• <b>Laura Chisholm</b> – Oregon Public Health Division – will serve as liaison from Sustainable Relationships for Community Health (SRCH) grant, which is anticipated to identify a lot of promising practices for referral and payment systems, and liaise with the Self-Management Network Steering Committee</li> <li>• <b>Jennifer Mead</b> – DHS State Unit on Aging – will liaise with the SM Network Quality Assurance, Fidelity and Metrics workgroup</li> <li>• <b>Tamara Burkovskaia</b> – Oregon Public Health Division - practical suggestions to coordinators regarding leader engagement and participant recruitment and retention.</li> <li>• <b>Ron Swanson</b>, NW Senior &amp; Disability Services – Living Well, Tai Chi Moving for Better Balance, A Matter of Balance, Diabetes Prevention Program, Walk with Ease – good tips, ideas to help leaders engage participants to help retention of participants, help leaders develop as facilitators after training.</li> <li>• <b>Sarah Worthington</b> – Deschutes County, coordinator for Living Well and Diabetes (DSMP) – new (since last fall), looking for strategies for recruiting and supporting leaders, improving referral systems (some in place now), consistent referral systems.</li> <li>• <b>Leslie Gilbert</b> – Senior &amp; Disability Services, Lane County – Living Well &amp; Tomando Control. How to increase class sizes and find ways to recruit more effectively. Very strong leader base but need more participants. Difficulties getting medical providers on board and actively referring.</li> </ul>	
<p>2. Workgroup Work Plan development (Laura/Tamara)</p>	<p>2:15-2:40</p>
<p><b>Objective:</b> Identify objectives and activities for the workgroup through 2015:</p> <ul style="list-style-type: none"> <li>• Review proposed areas to work on, outcomes, success metrics and resource</li> </ul>	

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<p>needs identified in the June 10, 2014 Network Business Meeting breakout notes and further clarified at January 15, 2015 SM Network Steering Committee meeting.</p> <ul style="list-style-type: none"> <li>• Brainstorm additional outcomes, metrics and resources needed.</li> <li>• Prioritize our lists.</li> <li>• Identify projects, timelines and leads.</li> </ul> <p><b>Background:</b> At the June 10 Network Business Meeting, attendees identified challenges related to leader engagement and retention and participant recruitment and access. A small group brainstormed a list of possible common projects.</p> <ol style="list-style-type: none"> <li>1) Working on challenges/barriers related to: <ul style="list-style-type: none"> <li>• Leader support: improving leader engagement and retention, incentives</li> <li>• Participant access: recruitment, retention, reaching out to underserved populations, offering programs in rural areas</li> </ul> </li> <li>2) How to achieve tangible and achievable outcomes.</li> <li>3) How will we know we have been successful?</li> <li>4) What do we need to do in order to achieve those goals?</li> </ol> <p><b>Discussion:</b></p> <ul style="list-style-type: none"> <li>• Developing a guide for reporting requirements</li> <li>• Developing Job description for program coordinators</li> <li>• Consistent information for training coordinators and new leaders</li> <li>• General education campaigns for self-management programs</li> <li>• Reimbursement &amp; stipend plan for coordinators and leaders</li> <li>• Promoting SM programs as worksite wellness/working with employers</li> </ul> <p>Priorities:</p> <ul style="list-style-type: none"> <li>• Leslie - we could come up with categories of places/programs that potentially could bring forth participants, then as a workgroup to speak up if we're having success, for example working with health clubs, share strategies or flyers, perhaps a website to post things to? Create a laundry list of categories of who we recruit and what entities we're reaching out to; connect off line or as a group.</li> <li>• Robin – Douglas County – could Jackson/Josephine share what they have learned on another call?</li> <li>• Lauren – Jackson/Josephine – perhaps before the next time the workgroup meets, we all familiarize ourselves with the marketing toolkit and Lauren can present how things have developed in their organization (with the caveat that much of this was done by Arlene Logan).</li> <li>• Laura: note that the “toolkit” is an online resource (see links at the bottom of the notes).</li> </ul>	
<p><b>3. Workgroup next steps (Laura/Tamara)</b></p>	<p>2:40-2:55</p>
<p><b>Objective:</b> Discuss and decide:</p> <ul style="list-style-type: none"> <li>• How often do we want to meet, and how long do we want to meet for?</li> <li>• Who will be our co-chairs?</li> </ul>	

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### Discussion:

- Send a link to the online marketing toolkit with the notes.
- Next meeting: Lauren and Brenda will discuss how they've used the toolkit, Nora will look at the online marketing toolkit and talk about their favorite.
- Referral systems for next meeting after that? – Yamhill (Emily and Bonnie) will share their referral form for self-management
- Meeting frequency suggestions: an hour every month? Hour and a half every month? Every other month? Take a poll by email – if we meet more than every other month we'll need to ask for assistance in taking notes.
- We'll decide on our co-chairs, possibly on a voluntary or rotating basis, after we establish meeting frequency/duration.

### Next steps:

- Tamara will send a Doodle poll to identify meeting frequency and duration.
- Tamara will send meeting notes with links (see links at the end of notes).
- Lauren, Brenda & Nora will discuss marketing toolkit and best uses at our next meeting.
- Bonnie & Emily will discuss the referral Yamhill CCO process at the following meeting.
- All those who didn't receive materials: send name, title, affiliation, phone, email for roster to Tamara at [tamara.v.burkovskaia@state.or.us](mailto:tamara.v.burkovskaia@state.or.us) or to SM listserve at [living.well@state.or.us](mailto:living.well@state.or.us).

Link to The Living Well Marketing and Financial Sustainability Toolkit (156 pages):

<http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Pages/LivingWellMarketingToolkit.aspx>

Link to Living Well Implementation Guidebook (189 pages):

<http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Pages/guidebook.aspx>