Section IV

Growing and Sustaining Programs

Oregon DHS Vision for Sustainability

Oregon DHS has identified goals and a vision for creating a sustainable statewide structure for the Living Well program. The following includes the mission statement and plan for the future of Living Well in Oregon.

All Oregonians have access to regularly offered, high quality, Stanford-licensed chronic disease self-management programs.

What would sustainability look like?

- Living Well, Tomando Control, and PSMP programs are offered regularly in communities across Oregon.
- All Oregonians have access to a Living Well workshop, either in person or online.
- These programs are financially secure, with ability to pay leaders, Master Trainers, and program coordinators for the valuable services they provide.
- Health plans and employee benefits reimburse for these programs, supporting financial sustainability for local organizations.
- There is consistency across programs with regard to fees and reimbursement mechanisms.

What needs to happen at the state level?

- Statewide fee structure–a recommended amount that Oregon organizations offering Living Well may choose to charge participants in order to cover program costs.
- Reimbursement–the development of tools and systems supporting reimbursement of Living Well programs by health insurers, worksites and other sources at the state and local level.
- Resources–the development of marketing materials, tools and support for organizations in order to contribute to the sustainability, implementation and fidelity of Living Well in the community.

Statewide Fee Structure

As of January 2009, only 17% of Living Well programs across Oregon reported that they charged a fee. This fee ranged from $5 to $120, with a mean of $30. This modest charge financial structure does not accurately represent the true costs of offering Living Well programs: it costs much more than $5 or $30 per participant when time for coordination, stipends for leaders, training, supplies, and marketing materials are considered.

In May 2009, a survey of Oregon Living Well programs that considered all costs, including supplies, leader stipends, licensing, staff time, meeting space, and so forth, estimated that the **average cost per participant is $375**. The survey also found that the more programs an organization offers, the lower their per-participant costs.

While many organizations are currently able to offer workshops free of charge or at a modest charge due to grant or foundation funding, this is not a sustainable model in the long term, nor will it allow for much program growth beyond the grant requirements.

Several organizations have expressed concern that charging for workshops will be a barrier for participants, or stated that they are unable to accept or process payments. These are valid concerns, and while the Living Well Network is in the process of setting a statewide recommended fee structure, it will be up to organizations whether or not to adopt this fee structure. Organizations could choose to charge the statewide fee for reimbursement purposes, but then offer scholarships or sliding scale fees for uninsured or underinsured participants.

A diversified approach to funding that respects participants' ability to pay has been demonstrated to be the most sustainable.* While establishing a consistently applied, reasonable fee structure is important, continuing to seek out sustainable funding and ways to embed Living Well programs within organizations is also critical for continuity.

To calculate your organization's costs for offering Living Well workshops, use the cost calculator provided online at http://oregon.gov/DHS/ph/livingwell/resources.shtml and reference the cost calculator manual in the resource materials following this section.

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* Financial Sustainability for Evidence-Based Programs: Strategies and Potential Sources of Financing. The National Council on Aging, The Center for Healthy Aging. October 2007.

Reimbursement

Approximately 68% of all Living Well participants in Oregon report having some form of insurance, and for participants older than 65, the number increases to 76%.* Offering Living Well workshops as a covered benefit would improve access to self-management programs for many Oregonians.

At present, limited reimbursement options for Living Well programs are available. Progress in Oregon has focused primarily on including Living Well as an employee benefit (including use of sick or flex time to attend workshops) or health systems offering Living Well for their members "in-house".

Ideally, all Living Well programs in Oregon would be able to be reimbursed. Health care purchasers and insurers would include Living Well as a covered benefit and provide reimbursement to either the organization offering the program, or directly to the participant. It is crucial that the reimbursement rate adequately covers the costs of offering the program.

The Living Well Network Reimbursement Workgroup is developing both the recommended statewide fee structure and tools and materials to support reimbursement at state and local levels. For more information on the Network and Workgroups, see Section II.

*DHS Living Well with Chronic Conditions Data Report. January 2009. Available online: http://www.oregon.gov/DHS/ph/livingwell/docs/datareport2009.pdf

Worksite wellness

Employers also have a role in supporting Living Well programs: as purchasers of health care benefits, employers strive to contain costs for health care, and have a vested interest in improving health outcomes for employees. Many Oregon employers have been investing in worksite wellness programs; some have even provided Living Well onsite for employees.

There are several options for employers/worksite wellness programs to incorporate Living Well programming, including providing Living Well as a covered benefit, allowing employees to use sick time or flex their schedules to attend Living Well workshops, or including Living Well in other wellness benefits. Some employers offer wellness programs to all their employees, regardless of insurance coverage. These programs may involve discounts or reimbursements for health and wellness-related activities, or a stipend that may be used for wellness classes such as Living Well or Weight Watchers.

Employers and those who promote worksite wellness are encouraged to adopt and implement one or more of these strategies that support Living Well.

Reimbursement Examples

Benton County Employee Benefits - Employee worksite wellness program obtained approval for employees to use sick time or to request flex time from supervisors to attend Living Well workshops.

Columbia United Providers (Vancouver) – Currently offers Living Well workshops free for their members.

Mid-Valley IPA – Currently offers Living Well workshops as a covered benefit for their members, through CareOregon.

Deschutes County Employee Benefits – Employees and their support persons are encouraged to attend Living Well via email blasts, county employee intranet and Web site, a weekly county executive report, flyers, and brochures located in public buildings. The employee pays $10 of the total $60 charge up front, while their family or support person attends for free. If the employee attends four of the six sessions they are reimbursed for that $10 and the self insurance fund is invoiced for the remaining $50 of the $60 fee, which goes to support Living Well programs.
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Community Senior Employment Program (CSEP) - A senior employment program for low income adults ages 55+ allows seniors to be paid a stipend (minimum wage) to attend Living Well workshops as part of their job readiness skills training. CSEP also can pay for low-income adults ages 55+ to attend leader trainings, if there are fees.

Mental Health Providers - Providers in Oregon can bill Living Well workshops as "psycho-educational services", depending on how many other "psycho-educational services" are available for their clients. Under this billing code, qualified mental health providers can be reimbursed $6.25 per 15 minutes per person. It is unknown if any mental health providers are currently using this code to bill for Living Well.

Oregon Medical Insurance Pool (OMIP) – Oregon's high-risk insurance pool started providing reimbursement in January 2007 for their members who complete at least four out of six sessions. OMIP directly reimburses members for up to $50 of the workshop fee.

Sustainability

Ideally, Living Well programs can be developed and supported as a part of a more comprehensive system of chronic disease prevention, treatment, and management. It is necessary for organizations to consider how to integrate Living Well in both community and health care settings.

It is understandable that sustainability planning may feel like less of an immediate priority than maintaining staffing, keeping on top of the administrative work required to offer programs, and juggling the many responsibilities program coordinators may have. Since grant funding and other financial supports are often time-limited, Living Well programs should consider planning ahead for financial sustainability.

Research indicates that five elements necessary to achieve long-term sustainability of programs in local agencies*. The five elements are:

(1) Flexibility - programs that are flexible can be adapted over time to fit available resources and the unique features of a community. For evidence-based programs, this does not mean modifying program content or protocols, but could mean examining where programs are being held, marketing and recruitment strategies and developing organizational partnerships to support workshop delivery.

(2) Champions – programs need supporters, people who will encourage programs to continue and will do everything in their power to ensure they do. Champions may be program staff, lay leaders or Master Trainers, community leaders, partners, or participants who truly believe in the program.

(3) Mission – programs need to "fit" with an organization's goals. Organizations that typically fit well with Living Well support evidence-based programs and place an importance on healthy aging, preventing or managing chronic conditions.

(4) Clear Benefits – organizations must see the program's value to their organization and the population served. This must be obvious and definitively stated. Benefits may include improved health and/or quality of life, or reduced costs.

(5) Support – once organizations see the value of the program, they must support it in meaningful ways, including adopting supportive policies and practices (e.g., referring patients to programs, contributing to workshop coordination and establishment of reimbursement systems).

*Adapted from "Is Sustainability Possible? A Review and Commentary on Empirical Studies of Program Sustainability." MaryAnn Scheirer, *American Journal of Evaluation*, Vol. 26 No. 3, September 2005, 320-347.

Options for Sustainability

There are many ways to work towards sustainability. Workshops can be adopted and implemented by health systems, hospitals, local public health and aging agencies, non-profits, and community coalitions. Offering Living Well could become part of an organization's wellness policy or part of a health plan's effort to improve community wellness and help patients reduce unnecessary hospitalizations.

There may be ways to increase or build new support for self-management programs within your own organization, and there may be other types of organizations that you can partner with. The more Living Well programs can be integrated with other agencies and initiatives across the state, the more likely programs will be sustained.

Organizations

Are there additional steps that an organization can take to demonstrate its commitment to Living Well? Some possibilities may include:

- Redefining or expanding an existing position to provide more support for Living Well.
- Dedicating existing financial resources for Living Well.
- Identifying skills and in-kind support that an organization can provide. Examples may include experience working with health system partners, earned media and media advocacy, providing space to promote programs on the organization's websites, or providing space to host workshops.

Partner Organizations

Consider the organizations with which your organization already has a relationship. Ask your internal partners, co-workers, or advisory board about organizations they work with. These organizations may be able to provide financial or in-kind support, or be a champion for Living Well programs. They may be able to open doors to other organizations and help you build relationships in support of Living Well.

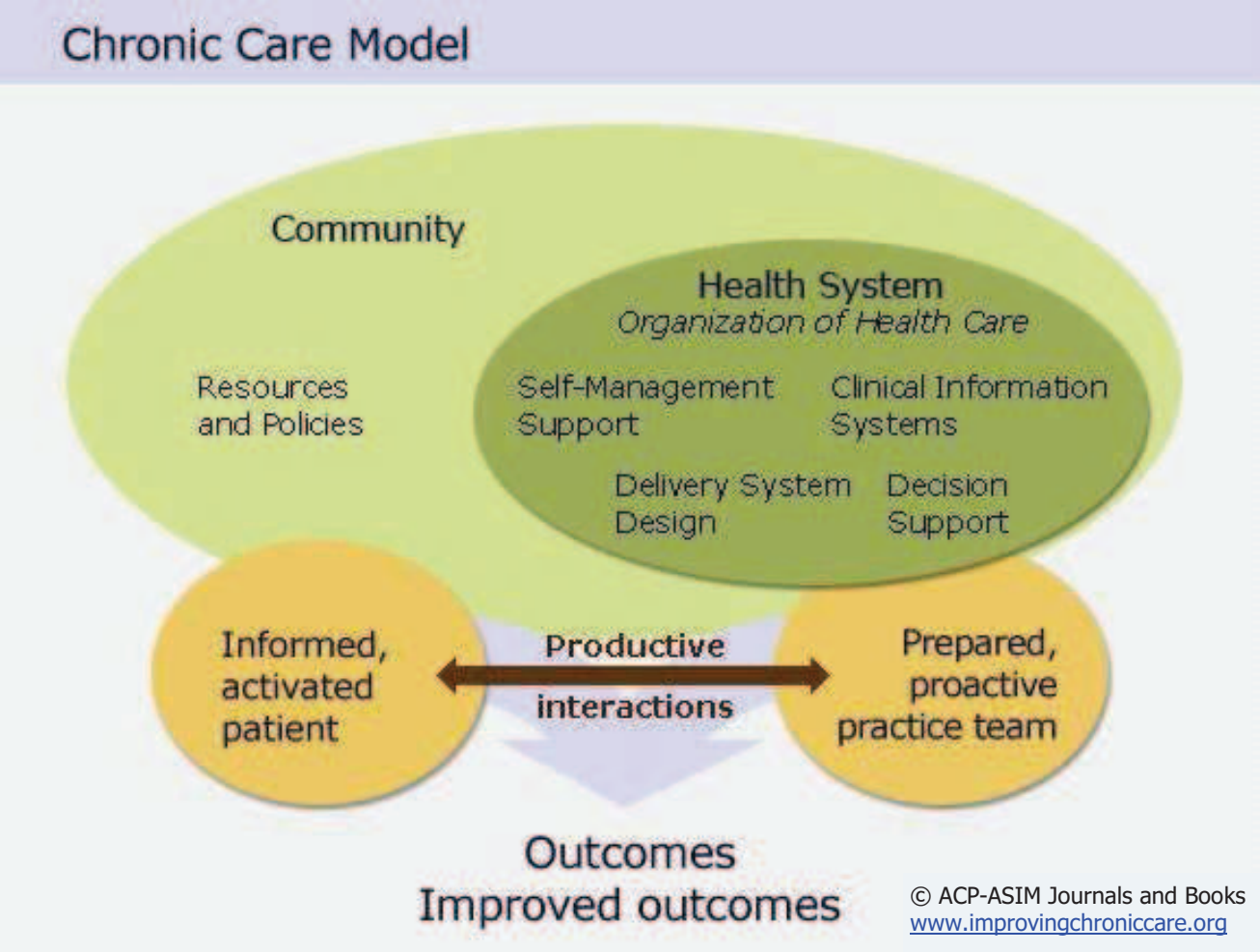
Health Systems

Health systems or clinics involved in primary care renewal, adoption of the medical home model, chronic care model implementation, and/or health care reform are all interested in options that improve patient outcomes, reduce inappropriate health care utilization (i.e., avoidable emergency department visits), and reduce costs. Living Well is a natural fit for health systems. On the following pages are some ways Living Well has been successfully integrated with health systems.

The Chronic Care Model – The Chronic Care Model (often referred to as the Planned Care Model) is a multi-dimensional, population-based model for delivery of care for chronic health conditions. The model relies on knowing which patients have a chronic illness, assuring that they receive evidence-based care, and actively helping them to learn what they can do to participate in their own care. Health systems working to implement the Chronic Care Model are appropriate partners for Living Well programs and may be interested in supporting the program in various ways, such as offering workshops onsite for patients or implementing physician referrals into community workshops.

There are six essential components to the Chronic Care Model:

(1) The Health Care Organization
(2) Community Resources and Policies
(3) Self-Management Support
(4) Decision Support
(5) Delivery System Design
(6) Clinical Information Systems



- **Group Medical Visits** are a popular approach to delivering primary care or disease-specific education to a group of patients with similar conditions. Group visits provide an opportunity for the health care team to actively engage patients in becoming more responsible and active self-managers. The group setting provides a venue for self-management discussions and goal setting for a more comprehensive patient visit. Living Well programs can be conducted onsite and can be a natural addition to group visits. For more information on group visits, read the American Academy of Family Physicians' Group Visits 101.*

- **Motivational Interviewing** is a method of reducing barriers to self-management through constructive dialogue that honors a patient's experiences and needs, and builds self-confidence. It is a technique that can be used to help providers refer patients to Living Well and collaborate with patients to set realistic, achievable goals for their health and wellness.

What Living Well participants say about the program

"I enjoyed reading 'Living a Healthy Life with Chronic Conditions'. I find it really practical. It helped me in many ways to give me a clear explanation and a positive way to deal with different aspects of the sickness."

"Because of this class, I now have the confidence to believe that I can continue to do the exercises that the physical therapist assigned to help with the persistent back pain. I have even set up a reasonable plan to address the excess weight that hampers my physical well-being and have the confidence to begin my journey in this direction."

* http://www.aafp.org/fpm/20030500/66grou.html

Living Well Organizational Sustainability Assessment

Use the following checklist to determine Living Well sustainability. Select the response for each category that best describes your Living Well program currently. At the end, determine if you have more square, triangle, circle, or energy ball answers.

Funding

- ■ We do not currently have funding to offer/support Living Well
- ▲ We have grant or foundation funding to offer/support Living Well
- ● We fund/support programs (e.g., paid staff time, purchase supplies)
- We utilize cost-recovery funding (e.g., workshop fees, reimbursement

Licensing

- ■ There are no licensed organizations in our county/region
- ▲ We provide workshops under another organization's license
- ● Our organization or partnering organization holds a license
- We hold the license for county/region

Leaders

- ■ We do not have any leaders (on staff, volunteers affiliated with organization, etc)
- ▲ Other organizations in the county/region have trained leaders
- ● We have leaders, but do not offer workshops on a regular basis
- We have sufficient leaders from partner organizations or community volunteers to offer regularly scheduled workshops

Master Trainers

- ■ We do not have access to any Master Trainers
- ● We have access to a sufficient number of Master Trainers

Coordination

- ■ We do not currently provide any coordination for Living Well
- ▲ We have staff with at least partial FTE dedicated to coordinating workshops
- ● We have at least one dedicated staff dedicated to coordinating workshops
- We have at least one dedicated staff coordinating workshops for the county/region

Partners

- ■ We do not work with any partners on Living Well
- ▲ We have identified partners for Living Well, but they are not yet actively involved
- ● We work closely with organizational partners to coordinate and promote workshops
- We have a broad coalition that communicates regularly to support workshops

Programs

- ■ We do not currently offer Living Well workshops
- ▲ We offer one-two Living Well workshops annually
- ● We offer more than two Living Well workshops annually
- We offer Living Well workshops on a well-advertised consistent schedule and locations
- We consistently offer multiple evidence-based programs (Living Well, Tomando Control)

Organizational Support*

- ■ We do not have high-level support* or champions in my organization
- ▲ Other organizations in the county/region support or champion Living Well
- ● We have champions, but no high-level support
- We have champions and high-level support

Results

Tally up the number of square, triangle, circle, or energy ball statements you selected.

■ Mostly Squares – Building Capacity

The Living Well program is still developing infrastructure in order to offer workshops. An organizational license may be in possession and infrastructure is supported by several trained leaders, but workshops are not yet being offered on a regular basis. The Living Well program most likely grant funded and there is no centralized program coordination or dedicated staff time.

Next steps: Continue to build infrastructure. Consider how many workshops you want to offer in the next 12 months. Do you need to train more leaders? Are there other organizations in your county/region that you could be partnering with?

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*High-level support specifically refers to administrative, managerial, or board level support of the program. Support can include: being knowledgeable about Living Well, prioritizing the program, dedicating staff time and funding or resources to the program, championing the program in the community, and/or seeking additional funding to support the program.

For our purposes, a champion is an individual or organization that is willing to advocate. Champions are both willing and powerful enough to be effective spokespeople or leaders for chronic disease self-management programs. A champion can be anyone – a public official, community leader, concerned citizen – who works hard to support programs.

Results (continued)

Mostly Triangles – Program Implementation

The Living Well program is offering workshops. A Stanford license has been secured and workshops are offered several times a year. Infrastructure is supported by some trained leaders and possibly some Master Trainers, but there has not yet been a leader training and inactive leaders are not being targeted for additional support. The Living Well program has some staff time dedicated to coordination, but there is not yet a firm organizational commitment to Living Well.

Next steps: Continue to offer Living Well workshops. Consider partnering with other agencies to make workshops more widely available. If you haven't already, begin developing high-level support: make presentations to your administration or board of directors. Demonstrate the value of the program. Become familiar with the evidence-base and marketing materials.

Mostly Circles – Program Expansion

The Living Well program is well developed and has most likely been offering workshops for several years. There is some form of centralized coordination in place, and the coordinator has been experimenting with marketing, recruitment, and quality assurance strategies. The Living Well program may be charging fees or have some form of reimbursement available to help support workshops.

Next steps: Continue to maintain or grow programs, but before you begin scheduling, consider your supply and demand. Are your existing leaders active? Are you utilizing your Master Trainers? Are there areas, especially rural ones, in your county/region that do not have workshops? Be strategic about expansion. Consider new partners.

Mostly Energy Balls - Creating Sustainability

The Living Well program is very well seasoned and is in a position to provide mentorship to other programs. A centralized coordination system has been developed, and a cadre of leaders is maintained and supported. The program offers robust recruitment and referral systems, including media advocacy to support programs. The Living Well program is most likely pilot testing new materials and tools to enhance programs.

Next steps: Continue to advocate for organizational support; the more Living Well can be embedded into your organization's mission and services, the better. Consider new and untraditional partners. Who else is your organization connected to? Who are you serving? Deepen your relationship with local media for additional coverage. Continue to develop your leaders and Master Trainers and your available resources. Share your best practices and lessons learned with other coordinators.

Partnerships

To grow and sustain Living Well programs, internal and external partners are vital. These relationships may take time to develop, including ample time in the beginning to define a shared vision and communication structure that works for all parties involved.

Identifying New Partners

Ask yourself and your existing partners the following questions:

- Who does Living Well benefit?
- Who saves money because of Living Well?
- Who would want to be publicly identified with Living Well?

Potential Partners

Many organizations have a vested interest in serving people with chronic diseases. Use the worksheet on page 52 to help identify potential partners.

Once you have identified potential new partners, consider how they would benefit from supporting Living Well. Make sure you have clearly defined "asks" and "selling points".

Approaching Potential Partners

Remember that there are many ways for organizations to support programs. It is rare to be awarded a large grant that will meet all your program needs, so consider specific asks. Think about what you are asking your partners to do. Be as specific as possible, but encourage creative new options! Some ideas include:

- Hosting a Living Well workshop at their organization
- Promoting Living Well workshops to their employees, members, or partners
- Arranging for media coverage
- Gaining earned media promotion (e.g., writing letters to the editor, articles, etc.)
- Referring participants to Living Well workshops (health care providers, case managers, medical information specialists can all provide referrals)
- Recruiting volunteers or personnel as potential new Leaders or Master Trainers
- Donating leader or Master Trainer staff time
- Providing direct financial support for the program
- Providing incentives for leaders or participants

See Section II for more details on program costs. If you need dollars, don't be shy about making a clear request, but remember to also include in-kind support and non-monetary support as options.

Potential Selling Points

- **Participants** – Paying for participants to attend a workshop helps sustain Living Well programming and assures that other participants will be able to attend in the future.
- **Volunteer/lay leaders** – Donating time to lead workshops helps reduce costs and assures that the workshop has lay leaders from the community.
- **Area Agencies on Aging (AAA)** – Living Well is consistent with their organizational mission; Living Well helps older adults with chronic conditions live healthier lives.
- **Local public health departments** – Living Well is consistent with their organizational mission; Living Well helps people with chronic conditions live healthier lives and helps reduce health disparities.
- **Local governments** – Living Well provides services to constituents; supporting Living Well improves coordination with other county/local agencies, creates a visible platform for the program, and gives governmental employees access to the program in county facilities or on work time.
- **Insurance companies** – Reduced use of unnecessary health care reduces costs to insurers.
- **Health clubs** – Supporting Living Well provides public relationship value and increased benefit to club members and may be consistent with the organizational mission.
- **Hospitals and health systems** – Reduced health care utilization reduces health systems costs; provides public relations value; offering Living Well improves health education options for patients.
- **Local, state, or national foundations** – Presents an opportunity for involvement in an evidence-based program effective across many chronic conditions.
- **Employers and human resource departments** – Supporting Living Well workshops for employees will likely reduce the number of sick days taken by staff, improve productivity and quality of life, and reduce health insurance premiums.
- **Community-based organizations** – Living Well provides a valuable service to the health and wellness of the populations served by various types of community-based organizations. The purpose of Living Well very often matches that of community-based social service organizations.

Presenting to Potential Partners

Once you have identified potential partners, considered appropriate asks, and developed targeted messaging, think about how you can best showcase Living Well programs. Consider the following:

Is your audience already familiar with Living Well?

- If not, be prepared to give an overview of the program – history, logistics, evidence-base, proven outcomes, and what is covered in a workshop. Show the Living Well promotional video for a brief synopsis of the program.
- Several existing presentations, including a "Living Well 101" presentation, are available on the DHS Web site. These presentations provide an overview of Living Well in Oregon, program structure, basic principles, the evidence-base, and talking points that you can use or modify for your audience. These presentations are available online at http://www.oregon.gov/DHS/ph/livingwell/resources.shtml#presentations.

Will your audience be most convinced by the evidence-base or personal stories?

- Be prepared to provide information on the evidence base – focus on both reduced costs and hospitalizations and improved health and quality of life.
- Be prepared to share participant testimonials, particularly from local participants, if available. Check out the quotes scattered throughout this document for some ideas.

What program materials can I share?

- Bring program materials, handouts, newspaper articles, and other promotional materials.
- Show the Living Well video (available in English or Spanish, download from http://www.oregon.gov/DHS/ph/livingwell/video.shtml or request a DVD from the state Living Well program).

What Living Well leaders say about the program

"Participants come to every class once started. We get great reviews and great opportunities to collaborate with other agencies!"

"We get positive feedback all the time. People often say we have changed their lives."

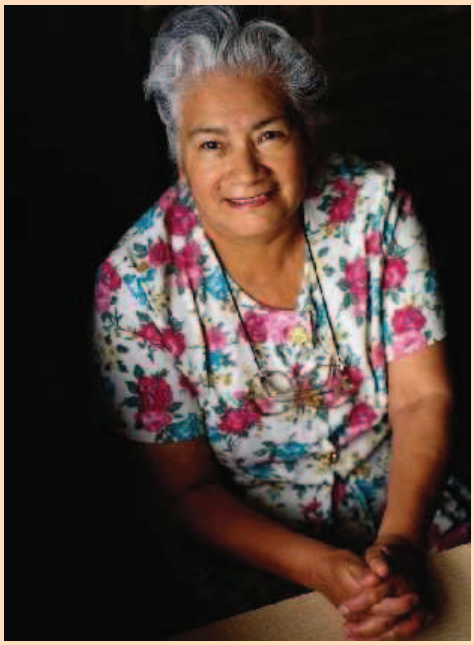
How can I convey the personal impact of the program?

- Invite a previous participant along as part of your presentation or pitch – do you have workshop participants whose lives have been changed by the program, or who have gone on to become lay leaders? These people can be incredible champions for the program.
- Include quotes and success stories from previous participants; work with your leaders to collect this kind of information or highlight quotes from the marketing materials or video. Be sure to honor confidentiality of participants.

Visit the Living Well Web site for downloadable resources and handouts you can use in your presentation - www.healthoregon.org/livingwell

What Living Well participants say about the program

"This six week workshop emphasizing solving problems and goal setting skills has been most effective in helping me improve my health. Before the class, my health screening of blood sugars etc was all abnormal. Near the end of the class another health screening showed them all with in normal limits. Hurrah!!!!"



Helpful links

Oregon Association of Hospitals and Health Systems

www.oahhs.org

Mid-Valley Independent Physicians Association

www.mvipa.org

Central Oregon Independent Practice Association

www.coipa.org

Oregon Primary Care Association

www.orcpa.org

Oregon Board of Pharmacy

www.pharmacy.state.or.us

Northwest Parish Nurse Ministries

www.parishnurseministries.org

Potential Partner Checklist

Utilize this checklist to:

- Identify organizations you are already partnering with
- Identify organizations you have already approached
- Identify organizations you would like to contact

Health Systems

- ☐ Hospitals and health systems
- ☐ Insurers
- ☐ Independent Physicians Associations (IPAs) and physician practices
- ☐ Federally Qualified Health Centers (FQHCs) and safety net clinics
- ☐ Pharmacists
- ☐ Disease management programs and/or support groups
- ☐ Parish nurses
- ☐ Rehabilitation clinics

Aging Services

- ☐ Wellness centers
- ☐ Retirement communities / centers for independent living
- ☐ Senior centers

Potential Partner Checklist (continued)

Community Organizations

- ☐ Faith-based organizations
- ☐ Health clubs
- ☐ Civic organizations (Rotary, Elks, etc)
- ☐ Local extension office
- ☐ For-profit businesses (especially those with a market interest in older adults, people with chronic conditions, health care providers, or retirement and wellness communities)
- ☐ Local, state, or national foundations (Northwest Health Foundation, etc)

Government Agencies

- ☐ Local Area Agencies on Aging (AAAs)
- ☐ Public health departments and other government agencies (WIC, etc)
- ☐ Mental health agencies

Helpful links

Oregon State University Extension Service

http://extension.oregonstate.edu/

Northwest Health Foundation

www.nwhf.org

Area Agencies on Aging listing

http://www.oregon.gov/DHS/spwpd/offices.shtml

Oregon mental health agencies listing

http://www.oregon.gov/DHS/mentalhealth/mho/mho-list.shtml

What Living Well leaders say about the program

"It is a fantastic series. It is a really impactful program. We have found success in targeting groups that already formed and facilitate to those groups - groups that already meet on a weekly basis."

"Of those who attend all sessions, they seem hopeful at the end of the class and have a livelier spirit. They know there are things that can help them and it's not all in the doctor's hands, but their own responsibility."