Living Well Sustainability Toolkit

Marketing and Financial Strategies

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Introduction and How to Use This Toolkit

As individuals involved with local Living Well with Chronic Conditions programs, the impact the program has on people's lives is clear. Living Well gives participants confidence, strengthens their ability to navigate the health care system, empowers them to take care of their health, and keeps them healthy and out of the hospital. Thank you for your contribution to these efforts!

One issue that Living Well programs face is how to continue to make the program available to everyone who needs it, on a consistent and ongoing basis.

This toolkit aims to help local Living Well programs with partnership development, marketing and recruitment of participants, and building financial sustainability to support the program in the long term.

The toolkit is divided up into the following three sections:

Section One: Marketing to Potential Partners
Tools to help identify and engage new partners to expand availability of workshops.

Section Two: Marketing Your Program to Potential Participants
Ideas and tools to help publicize workshops and get people enrolled.

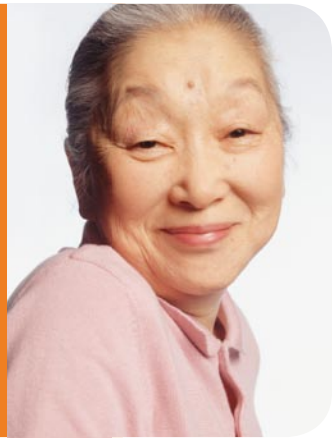
Section Three: Financial Sustainability
Tips and tools for identifying, approaching and successfully partnering with key types of organizations that can help provide financial support for making programs available long-term.

How to Use This Kit
Begin by skimming the table of contents to see what information and tools meet your immediate needs.

1. Read the introduction to each section to learn more about why and how to focus on this aspect of the work.
2. Access the specific tools you need, customize them to fit your program, and try new ways to build your Living Well program!
3. Let us know how these materials are working, and what else you need. Please send comments, suggestions and requests to the Oregon Living Well Program at 1-888-576-7414 or living.well@state.or.us.

SECTION 1

Marketing to Potential Partners



Section One: Overview

Once your organization decides to take on Living Well with Chronic Conditions and offer it to your clients or community members, one of the first steps is to create strong partnerships with other organizations, which will provide a strong base for a successful program.

Local partners can support your efforts by:

- Providing a consistent referral of participants into workshops (i.e., health clinics, social service providers, case managers).
- Offering staff or volunteers to be trained as Living Well leaders.
- Providing free meeting space for workshops.
- Providing grants, funding, or in-kind support.
- Offering staff time to assist with day-to-day workshop operations.
- Allowing you to advertise Living Well or providing free or low-cost print or television advertising.
- Participating in a planning or advisory group for the Living Well program in your community—helping to plan for outreach and sustainability of the program long-term.

Tools in this section include:

- **Elevator Speech:** Succinctly describe what Living Well is all about, in a way that resonates with the partner you are trying to develop a relationship with. Start by honing your elevator speech.

- **Benefits to Partners:** Once your potential partners have some basic information about Living Well, you'll want to sell them on the benefits of their involvement in the program. Depending on the type of organization you're looking to partner with, you'll need to tailor the benefits to their mission and priorities.

- **Sharing the Evidence:** When solidifying your partners' buy-in, you'll want to make sure and share some of the highlights about the impact of Living Well. The evidence review should be short and sweet, similar to your elevator speech.

- **Referrals:** Obtaining consistent referrals into your Living Well program can be a time-consuming but important part of partnership building. Tailoring your pitch to your target audience and having some referral tools on hand will help make this process easier to get underway.

Elevator Speech/Talking Points

Your potential partners will first need to know what Living Well is. Although it is sometimes difficult to explain what Living Well is all about, clear and concise descriptions of the program will help open the door for more conversations about how your organization and the potential partner can work together.

It is important to identify your audience so you can best tailor your messages to make a compelling case. For example, a community partner could be the owner or manager of a facility that could be used for Living Well workshops. The ask is focused on how and why they should partner with Living Well. A hospital is an example of a community influencer, as they have the power to make Living Well workshops a routine offering prior to a patient being discharged.

Below is an example of an elevator speech, as well as talking points to use when meeting with community partners and community influencers.

Elevator Speech

Living Well with Chronic Conditions is a workshop for people with lifelong health conditions, such as heart disease, arthritis or diabetes. It works: Participants have less pain, more energy and fewer hospitalizations. Some of the topics covered in the workshop include pain and fatigue, eating well, fun ways to get active, and communication with doctors and family members.

Talking Points

To Community Partners
Living Well with Chronic Conditions is a workshop for people with lifelong health conditions, such as heart disease, arthritis or diabetes. It works: Participants have less pain, more energy and fewer hospitalizations.

The workshops teach participants how to take good care of their conditions, and create a supportive environment and a sense of community. Some of the topics covered in the workshop include pain and fatigue, eating well, fun ways to get active, and communication with doctors and family members.

Living Well is an evidence-based program developed by Stanford University and supported by the Oregon Health Authority. There's also a culturally appropriate, Spanish-language version called Tomando Control de su Salud.

(If time allows) People really love the workshops. For example, [insert a quick testimonial or story about a real person who took the class and has seen real benefit].

Organizations like yours can host or support a workshop, and we make it very easy. We provide [fill in what you are offering, the workshop, leaders, coordination, etc.]; you just provide the [fill in your ask of this specific partner]. Would you be interested in [reiterate the ask of this specific partner]?

OR

You can find more information by visiting our website at [insert your website or OHA's website] or by calling [phone number].

To Community Influencers

Living Well with Chronic Conditions is a workshop for people with lifelong health conditions, such as heart disease, arthritis or diabetes. Nationally, 80 percent of older adults have at least one chronic condition, and 50 percent have at least two[1]. In 2005, chronic diseases claimed the lives of 19,219 Oregonians and resulted in $1.4 billion in hospitalization costs[2].

This can be prevented or lessened by eating well, moving more, avoiding tobacco use and getting regular health screenings. The workshops teach participants how to take good care of their conditions, and create a supportive environment and a sense of community.

It works: An Oregon State University report on the 4,000 Oregonian program participants estimates significantly improved health, reduced hospitalizations and emergency visits, and health care savings of more than $6.5 million[3].

Living Well is an evidence-based program developed by Stanford University and run by the Oregon Health Authority. There's also a culturally appropriate, Spanish-language version called Tomando Control de su Salud.

Support Living Well and help create more programs in local communities and make self-management an automatic part of the health system.

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[1] http://www.nia.nih.gov/HealthInformation/Publications/ClinicianHB/06_chronic.htm

[2] http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/Documents/healthor.pdf

[3] http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Documents/Living Well Program Impact Report Final.pdf

How to Communicate Living Well's Effectiveness and Benefits to Partners

After your potential partner has a basic understanding of what Living Well is, you can share some of the benefits of the program so your partner will know how the partnership can benefit its organizational mission or the clients it serves.

As with recruiting participants, a good testimonial can be an excellent way to convey the importance of Living Well to your potential partner. One resource to provide this information is the "Changing Our Lives" video, developed here in Oregon. To access the video, visit http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Pages/video.aspx.

Alternatively, you can consider tailoring your testimonial to the population your potential partner serves, such as older adults or individuals with a specific chronic health condition, like diabetes or cancer. Use a testimonial that will really resound with your potential partner. See Section 2 of this toolkit for information on gathering testimonials.

Potential partners are listed below along with examples you can share with them about how Living Well can benefit their organization.

Nonprofit Social Service Organizations

Social service organizations generally have individual or community well-being at the core of their missions. Sharing a strong testimonial will really be helpful with these types of organizations, as they often rely on success stories to secure their own funding and convey a clear message about the important work they do. Some ways that Living Well can be important for social service organizations include:

- Living Well can help individuals take control of their health and their lives.
- Living Well has the potential to not only improve the individual's health, it can improve the health of his or her family as well.
- Living Well uses a peer model, so individuals who have chronic health conditions are a key part of program delivery.
- Living Well is relatively inexpensive to implement, and is a valued community resource.
- Individuals who participate in Living Well often go on to lead longer, healthier, and more productive and satisfying lives. Living Well can help people engage more fully in their communities and the things they love to do.
- Living Well can be a helpful component to the important service your organization provides the community.

Hospitals, Clinics and Health Plans

Hospitals and clinics will also be interested in participant testimonials, but will probably be more compelled by one that relates more directly to a health condition and/or experience with the health care system (please refer to *Section Three: Financial Sustainability* for detailed descriptions, talking points and issue briefs). Some ways that Living Well can be important for hospitals and clinics include:

- Living Well can help patients communicate more effectively with their health care team.
- Living Well can help patients use the health care system more appropriately.
- Living Well can help patients put lifestyle changes associated with their chronic health condition into place, so they are better able to manage their conditions when they are outside of the health care setting.
- Living Well does not interfere with any medical treatments.
- Living Well can be an excellent complement to disease education because it can help patients put their care plans into action.
- Living Well can help reduce hospitalizations and outpatient visits.
- Living Well can help patients better manage their medications.
- Living Well helps patients improve fatigue, self-reported general health, and their overall self-efficacy.
- Living Well is appropriate for patients with multiple chronic health conditions. In fact, the average participant in Living Well reports having at least three chronic health conditions.

Local Health Departments

Some local health departments in Oregon provide health services, and some even provide primary care services. Therefore, many of the talking points provided under the Hospitals, Clinics and Health Plans categories will also apply to local health departments (please refer to *Section Three: Financial Sustainability* for a detailed description). Other ways that Living Well can be important to local health departments include:

- Living Well has an ability to reach some of our most vulnerable community members—people living with ongoing health conditions.
- Living Well can be used in a variety of settings for many different populations. It is appropriate for many groups of people.
- Living Well can help prevent the worsening of chronic conditions for people who already have them.
- Living Well is relatively inexpensive to implement, and is a valued community resource.

Aging Service Organizations

Aging service organizations have a particular stake in the health and well-being of older adults, so your testimonial should come from an older adult participant. Some ways that Living Well can be important for aging service organizations include:

- Living Well can help older adults maintain control of their health, regardless of the conditions they are faced with.
- Living Well can help older adults improve their quality of life and do the things they love to do. It can also help older adults engage more fully in their communities.
- Living Well is suitable in community settings, including senior centers, senior housing, retirement communities, and assisted living facilities.
- Living Well can help reduce hospitalizations and outpatient visits. It has the potential to help people living with chronic health conditions stay longer in their own homes.
- Living Well can help older adults build a community, by providing an outlet for meeting with other community members on a regular basis.

Employers

Employers, whether a local business or the human resource leadership of one of the partner organizations listed above, are concerned with the health of their employees. Some local businesses may also be interested in building up public relations and a relationship with the community in general (please refer to *Section Three: Financial Sustainability* for detailed descriptions, talking points and an issue briefs). Other ways that Living Well can be important to employers include:

- Living Well has the potential to improve work attendance and productivity.
- Living Well has been shown to improve the health and quality of life of participants.
- Living Well has the potential to reduce hospitalizations and outpatient visits, which can help save on insurance premiums.
- Living Well is an inexpensive, valued community resource.
- Participants in Living Well are better able to engage in their lives and do the things they love to do every day.

Sharing the Evidence

At some point in your initial meeting with a potential partner, you will want to share information about the research and evidence behind Living Well. It is best to keep this information short and sweet. Unless you are talking with a group of university researchers, most partners will be more interested in the highlights. The following are some example statistics, taken from the *Living Well Program Impact Report*, to share with community partners.[1]

- Living Well has a strong impact on participants' quality of life. Of the nearly 4,000 Oregonians that participated in the program between 2005 and 2009, an estimated 107 years of perfect health were gained among participants.[2]
- Living Well can conserve precious health care resources. Among the nearly 4,000 Oregonians that participated in the program between 2005 and 2009, an estimated $634,980 was saved in reduced emergency department visits, and $6,501,088 was saved in reduced hospital days.
- Living Well participants report improved energy levels, reduced fatigue and health distress, improved self-confidence, and ability to engage in social and life activities.

Track Record in Oregon

After your potential partner has a basic understanding of what Living Well is, why it is important and what impact it can make, you can substantiate this information with Oregon's track record with the program. Again, this information should be kept brief, but it can be a great way to secure validity and support for the program among your potential partners. The following example statistics, taken from the *Living Well Data Report*[3], can be shared with community partners.

- Living Well has been implemented in Oregon since the early 2000s.
- Between August 2005 and December 2010, nearly 6,000 Oregonians have participated in a Living Well workshop.
- Living Well is available in nearly all Oregon counties, and participants in Living Well have come from all but one Oregon county.
- (Determine if the following statement is appropriate for the partner you are trying to recruit.) Living Well is a priority for both state and federal government. A wide range of government agencies contributes funding and staff time to support the growth of Living Well.
- Many organizations across Oregon are already involved with Living Well—hospitals, clinics, the Veterans Affairs, Area Agencies on Aging, universities, local health

[1] http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Documents/Living Well Program Impact Report Final.pdf
[2] http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Documents/Reports/statedata11.pdf

departments, churches and community service organizations have taken a role in the program in communities across the state.

Additional resources include:

- Living Well County-Level Reports: http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Pages/pubs.aspx - County-level

- Living Well Newsletter: http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Pages/connect.aspx

Referral Letter Template to Clinics & Providers

The following letter can be used for sending to health clinics and providers, as it often may be difficult to schedule a face-to-face meeting with a provider. Based on what clinic you're working with, you may consider addressing the letter to the office manager or administrator, who could bring it to the attention of providers as well as front desk and other staff members. Because clinics are very busy and receive a lot of mail, you may want to consider dropping off the letter by hand and following up by phone or in person. Anything you can do to make your communication materials stand out will increase the chances that someone reads it.

Dear [Name of clinic/provider],

I am a [name of position] of the Living Well with Chronic Conditions workshop offered in [city/county] County. Living Well is an evidence-based program developed by Stanford University and supported by [name of your organization], in coordination with the Oregon Health Authority, that helps people affected by a chronic disease learn how to self-manage their disease and maintain a better quality of life.

Living Well workshops take place over six weeks, with one 2.5-hour session held each week. Most classes are low cost or free. They are hosted by community organizations and taught by trained leaders, many of whom have chronic conditions themselves. Participants will:

- Receive support from trained leaders and other workshop participants.
- Learn practical ways to manage their pain and fatigue.
- Learn about nutrition and exercise choices.
- Understand new treatment choices.
- Learn better ways to communicate with doctors and family members.

Nationally, 80 percent of older adults have at least one chronic condition and half have at least two.[1] Learning how to self-manage a chronic disease is especially important since chronic diseases are responsible for seven out of 10 deaths every year.[2] At the end of the six-week workshop, participants have less pain, more energy and fewer hospitalizations.

Would you consider referring patients to the Living Well program? Providing support for self-management is an important aspect of patient-centered care. Health systems, such as Good Samaritan and Tuality, are now routinely referring patients. Living Well does not conflict with a patient's existing treatments or programs and is designed to enhance their treatment, complementing existing disease management programs and provider relationships. Your support of the program

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[1] http://www.nia.nih.gov/HealthInformation/Publications/ClinicianHB/06_chronic.htm

[2] http://www.cdc.gov/chronicdisease/overview/index.htm

makes it possible for individuals to live well, for communities to embrace health and disease prevention, and to reduce the demand on our health care system.

Workshops are open to anyone, or any age, with a long-term health condition. Living Well is also appropriate for people who have multiple chronic health conditions. Workshop information can be found at [website].

[Include brochures]

Thank you,
[Your name]

Living Well with Chronic Conditions

The Stanford Chronic Disease Self-Management Program

(Presenter)

(Location)
(Date)

What Is Self-Management?

The tasks that individuals living with chronic health conditions must do in order to live a healthy life:

- Working with doctors as health care **partners**
- Getting **support** from family and friends
- **Working through problems** as they arise, including pain, fatigue, frustration or depression
- Learning how to **eat well** and be **physically active**
- Understanding how to **use medications correctly** and **assess new treatments**

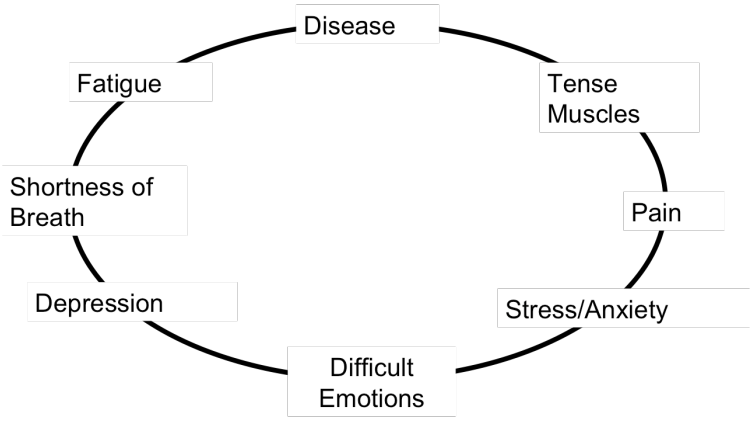
Program Overview

- 2 ½ hours per week for six weeks
- Groups of 10-15 people
- People with multiple chronic conditions and symptoms in the same group
- Focus on self-efficacy, action planning, problem solving, and effective communication
- Facilitated by **trained leaders** working with Stanford University **licensed organizations**

Programs Available in Oregon

- **Living Well with Chronic Conditions**: English language Stanford Chronic Disease Self-Management Program
- ***Tomando Control de su Salud***: Spanish language and cultural adaptation of Living Well
- **Positive Self-Management Program**: Adapted for people living with HIV/AIDS and their caregivers

The Symptom Cycle



Self-Management Toolbox

- Physical activity
- Medications
- Managing fatigue
- Action planning
- Better breathing
- Understanding emotions
- Problem solving
- Using your mind
- Managing pain
- Communication
- Healthy eating
- Working with health professionals

Action Planning

- Something you want to do
- Achievable
- Action-specific
- Answers the questions:
  - What?
  - When?
  - How much?
  - How often?
- Confidence level of 7+ (out of 10)

Problem Solving

1. Identify the problem
2. List ideas
3. Select one
4. Assess the results
5. Substitute another idea
6. Use other resources
7. Accept that the problem may not be solvable

Research to Support Living Well

Randomized, controlled trial of 1,000 Living Well participants found that participants:

- Had improvements in self-reported health
- Increased ability to participate in social activities
- Were more active
- Had greater self-confidence
- Had more energy and less fatigue
- Spent fewer days in the hospital
- Had fewer outpatient and ER visits

Sources: Lorig, KR et al. (1999). *Med Care*, 37:5-14; Lorig, KR et al. (2001). *Eff Clin Pract,* 4: 256-52; Lorig, KR et al. (2001). *Med Care,* 39: 1217-23.

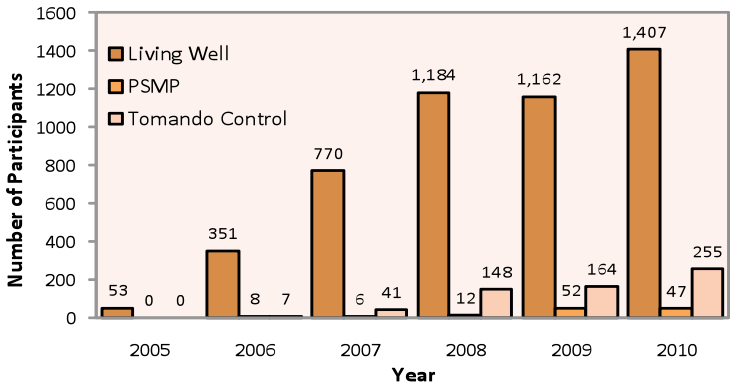
Estimated Impact of Living Well in Oregon

Matching the outcomes found in the original research with program reach to date, it is estimated that Living Well has resulted in:

- Improved psychological well-being, energy and self-confidence to manage one's health condition
- 107 quality adjusted life years gained (one additional week of "perfect" health per year
- 553 avoided emergency room visits, saving $634,980 in health care expenditures
- 2,783 avoided hospital days, saving $6,501,088 in health care expenditures

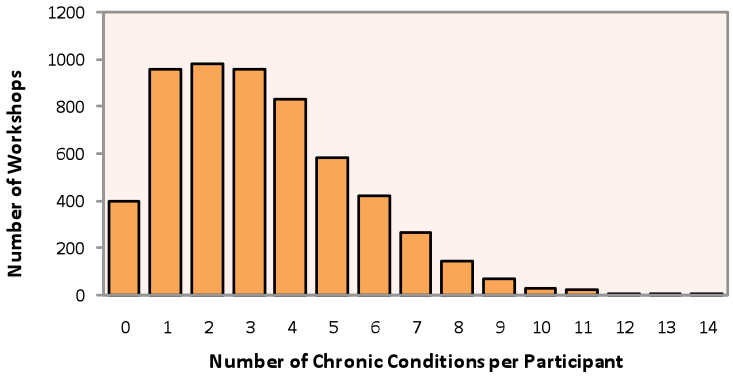
Source: Bovbjerg, VE & Kingston, SJ. (2010). *Program impact report: Oregon's Living Well with Chronic Conditions.* Oregon State University.

Living Well Participation in Oregon by Program, 2005-2010



Number of Chronic Conditions Per Participant

The average participant in Living Well reports having **3.3** chronic conditions.



Self-Reported Chronic Conditions

Self-Reported Chronic Condition(s)	Ages < 60 (2,440)	Ages >= 60 (3,089)	Total* (5,667)
Arthritis/Fibromyalgia	41% (991)	56% (1,734)	49% (2,782)
High blood pressure	28% (677)	46% (1,417)	38% (2,130)
Chronic pain	43% (1,042)	34% (1,035)	37% (2,113)
Depression	44% (1,071)	25% (777)	33% (1,871)
High cholesterol	26% (628)	32% (1,003)	29% (1,664)
Diabetes	26% (633)	30% (922)	28% (1,585)
Heart disease	7% (167)	22% (679)	15% (866)
Asthma	16% (396)	14% (437)	15% (848)
COPD	7% (168)	12% (381)	10% (563)
Cancer	6% (137)	12% (367)	9% (510)
Stroke	2% (57)	6% (192)	5% (257)
Multiple sclerosis	2% (58)	1% (34)	2% (94)
None of the above, accompanied family or friends	11% (276)	6% (200)	9% (484)

For More Information

Oregon Living Well Program

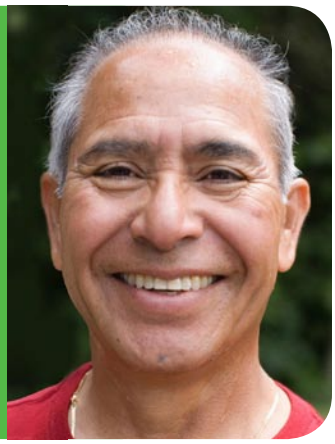
www.healthoregon.org/livingwell

1-888-576-7414

Living.well@state.or.us

SECTION 2

Marketing to Potential Participants



Section Two: Overview

Once you've established host sites and scheduled Living Well workshops, the next step is to spread the word and motivate participants to sign up. Creative, consistent outreach in your community helps you build relationships and ensure that a wide range of people have a clear understanding about the workshop, its benefits and how they can sign up. The tools in this section are designed for Living Well programs across Oregon and will show you how to market your workshop, in partnership with the host site, to potential workshop participants.

Although individuals involved with the Living Well with Chronic Conditions, Tomando Control de su Salud, and Positive Self-Management Programs have seen the benefits to those participating in these workshops, sometimes it can be challenging to recruit people living with chronic conditions. Recruitment of participants can also take a lot of time, even for people with a marketing background.

The tools in this section, outlined below, cover three steps: preparation, media outreach and other marketing.

Preparation: Creating Your Marketing Materials

The following tools will help you compile persuasive materials to share information about your workshops to grab the attention of potential class participants.

Tools in this section include:

- **Targeting Your Audience:** Identify your target audiences, including new audiences, people experiencing health disparities and "unusual suspects" (those you have not worked closely with in the past), and determine the best ways to reach them.

- **Multicultural Marketing and Communication:** Gain insight and tips on reaching Spanish-speaking audiences with Tomando Control de su Salud, as well as engaging other priority audiences.

- **Getting Back to Basics: Self-Management:** Language to help you explain "self-management" and why it's an essential part of chronic disease prevention.

- **Elevator Speech:** Quickly and simply explain what Living Well is all about.

Media Materials

Media outlets are a trusted communication channel to your audiences and can significantly increase the reach of your messages. You can tell stories about people who have benefited from the

workshops, people who love teaching them, the ways Living Well reduces the impact of chronic disease, etc. You can also link your program to current news stories.

Consider the different media outlets in your community and determine which approach is the best for reaching your audience. Would people be more inspired to join Living Well if they read a newspaper article or saw a live segment on TV? Would an op-ed signed by a trusted source, such as a local doctor or a guest column from workshop leader, be more effective?

Tools in this section include:

- **Testimonials:** An individual's personal story about the benefits of Living Well is priceless. People who have participated in a workshop provide a trusted, real-life perspective, and a valuable endorsement. Use this tool for gathering and sharing your own testimonials.

- **Spokespeople:** Good spokespeople add a human element to the story. A good spokesperson is one who will be comfortable in front of the media and will communicate your key messages. Use this tool to identify and prepare your spokespeople.

- **News Release Template:** Easily create a news release about your workshop(s) and submit it to your local media outlets.

- **Pitching a Story to the Media:** Ideas for how to approach the media and encourage them to write a story on this issue.

- **Op-Ed Template:** An op-ed (literally "opposite the editorial page" because that's where it is traditionally placed) is a submission that aims to educate readers about an issue and encourages them to act. An op-ed should include facts and statistics and be authored by someone who has authority in the community and is influential to your target audience. Many media outlets limit the length of op-eds, so it is wise to check ahead of time and edit to an appropriate length before submitting.

- **Radio Public Service Announcement (PSA) Script**: Some radio stations will read a PSA for nonprofits/volunteers for a reduced cost, or sometimes even for free. Customize this script and contact your local radio station.

- **Guide to Calendar Listings:** Most newspapers list events both in print and on their websites. Submitting information about your workshop is quick and easy, as most newspapers allow you to submit electronically. Use this guide to find information about how to submit class information to newspapers in your community.

- **Advertising in Media:** Ideas for placing a paid advertisement in different locations throughout your community.

Marketing Through Other Channels

Using non-traditional communication channels can help you reach a broader audience and increase awareness about Living Well. Community partners are trusted sources, which will add further credibility to the information you are sharing.

Tools in this section include:

- **Engaging Health Care Providers:** A guide to working with health care providers to increase referrals to the Living Well program.

- **Electronic Marketing Tools:** Asking your community partners to share information about the workshop through their communication channels is an important way to increase reach of your key messages. This tool provides content that can be used in newsletters, e-mails, websites, etc.

- **Guide to Using Social Media:** Social media is a growing and powerful way to share information. This tool provides information on how to effectively use two of the most popular sites, Facebook and Twitter, and shares tips about what you can do there to promote your workshops.

- **How to Create a Word-of-mouth Referral Program:** Program participants are the best referral sources. This tool provides ideas and tips for asking graduates to tell their friends and family about Living Well.

Targeting Your Audiences

Now that we have some grounding in how to talk about Living Well in a way that resonates with people living with chronic conditions, we can learn more about ways to reach the populations that will benefit from Living Well workshops.

Often you'll need to think beyond the "usual suspects," meaning the audiences you reach out to or work with frequently. It is particularly important to think about how to reach populations that are disproportionately affected by chronic disease. Factors that can contribute to an individual's ability to be in good health include his or her race or ethnicity, socioeconomic status, sexual identity and geographic location, among others. These factors can cause people with fewer resources to more frequently experience disease, disability and premature death. See the document **"Multicultural Marketing and Communication**" for more information. Sometimes the people who are most likely to seek out and sign up for Living Well workshops are those with more resources, so it is important to consider how to reach beyond the "usual suspects."

It may seem difficult to determine exactly who falls beyond the "usual suspects." Fortunately, there are data sources available to help you determine this:

- What groups or communities have the highest **rates of chronic disease** in your community?
- What groups or communities are **currently attending** Living Well workshops?
- What groups or communities have **not been attending** Living Well workshops?

It is best to sit down with your partners or stakeholders and spend some time looking at the data before developing your targeted outreach strategy. Some data sources to consider in helping look at your community, compared to who you've already reached with the program, include:

- Living Well Data Report and Living Well County Data Fact Sheets: http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Pages/pubs.aspx
- U.S. Census American Community Survey: http://www.census.gov/acs/www/
- Keeping Oregonians Healthy Report: http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/Documents/healthor.pdf

Based on the populations that most need Living Well, but are less likely to be served by the program to date, use the tool on the next page to map out who your audiences are and how to engage them.

SECTION 2.2

Marketing to Potential Participants

AUDIENCE Who are the people we need to reach?	**PATHWAY** If you don't know this audience well, who do you know who can provide perspective and make introductions?	**VALUES** What is important to this audience?	**OUTCOME** What do we want them to do?	**MESSAGE** What do they need to know to take the action we want?	**MESSENGER** Who is the best messenger? Who do they listen to? How can you involve your partners?	**STRATEGY** How will we make this happen? What is the best approach for reaching them?
Ex: Latino community, all ages	*Ex: Promotoras*	*Ex: Family, Community*	*Ex: Sign up for Tomando Control de su Salud workshops and become messengers for the program*	*Ex: "Tomando Control de su Salud has a positive impact on your overall health and is an opportunity to improve your life and your family's."*	*Ex: Promotoras*	*Ex: Visit key gathering places in the community, such as churches or community centers, and ask a promotora to share information and give a demonstration of what happens in the Tomando Control de su Salud workshop.*

Multicultural Marketing and Communication

Taking a multicultural approach to marketing Living Well makes the classes relevant and have more of an impact by recognizing, respecting and engaging the cultural backgrounds of the audience.

As you work to broaden your reach and ensure you are offering the Living Well/Tomando Control de su Salud opportunity to everyone, especially people experiencing disparities, consider these principles and practices.

PRINCIPLE 1: Check Your Assumptions at the Door: *Begin with yourself*

Before beginning to work with any group that is culturally, ethnically or racially different from your own, it is critical to step back and identify any assumptions, preconceived beliefs or stereotypes that you might hold about that population. Your best intentions may be undermined by old assumptions or isolated experiences that can affect your ability to develop a sound strategy that effectively achieves the behavioral, attitudinal or systems change you seek. It is also essential that you not assume a particular group holds the same set of values or beliefs as your own.

Best Practices:

1. Consider that different audiences will respond to Living Well in different ways. What works for Caucasian seniors, for example, may not be relevant to Latino families. Be open to learning new communication methods, and realize that you may have to take different approaches.

PRINCIPLE 2: Understand the Cultural Context(s) of Your Audience: *Do your homework*

The goal of any communication is creating shared understanding. When we relay a message, it is with the expectation that the receiver can interpret as the sender intended and has the ability to choose to take action accordingly. This is not always the case. Various cultural groups have unique ways of perceiving, organizing and relating to information. They may have different needs, values, motivators and behaviors. The norm for one group may not necessarily be relevant or appropriate for another group. The message must fit the cultural context (the norms, ideas, beliefs and totality of meaning shared by a cultural group) of the audiences you want your communication to reach.

Best Practices:

1. Be aware of norms, traditions, dialects and other cultural nuances that are unique to your audience. Depending on characteristics such as country of origin, length of time in the

United States and level of acculturation, audiences may have very different political views, family traditions and use of language.

2. Identify and build upon cultural strengths and assets. For example, in the Latino community, family is very important and influential. How can you connect Tomando Control de su Salud and the benefits it offers with these values? Consider ideas such as encouraging class participants to share what they are learning with their family members or bring them along to a workshop.

PRINCIPLE 3: Invest Before You Request: *Create "community-centered" partnerships*

Too often the first introduction to specific populations is a request for assistance in conducting outreach, sharing information, facilitating market research or referring participants to programs. In many cases, communication is one way and self-centered—what can this person or organization do for us?

By investing in the community—learning about organizational needs, attending events and community forums, and participating in community-based efforts—you can build trust and build the foundation for long-term engagement.

Best Practices:

1. Identify one new audience you aim to engage in Living Well. Start networking now, and spend the next few months learning, listening and showing your respect and investment in the community. You will likely find yourself in a much more connected and knowledgeable place to begin your outreach.
2. Go to the community. Don't expect people to come to you until they know and trust you. Attend events and venues, on a regular basis, that are important to this community, which could include visiting places of worship, community centers, etc.

PRINCIPLE 4: Develop Authentic Relationships: Maintain a long-term perspective

Authentic relationships are those that engage community members in idea generation, feedback and decision-making. Such a relationship is patiently developed because there is no need to rush to get to know and understand each other. The relationship is based on a true sense of shared values and shared mission and is focused on ongoing collaboration rather than a specific project. Communication, contribution and commitment are all two-way.

Best Practices:

1. Work with individuals and organizations that already have a relationship with members of the community and can help introduce you.

2. Ask to have a meeting to discuss Living Well /Tomando Control de su Salud and get an understanding of how it might appeal (or not), how to talk about it, and what changes you may need to make it more relevant. These could be simple adjustments, like making sure your section on healthy eating includes information about traditional foods.
3. Try to have leaders from your priority cultures, if possible.
4. Maintain your partnerships. Keep in touch and follow up.
5. Become an ally and be supportive of issues that are important to the community. How can you integrate some key concerns, interests and values into your work?

PRINCIPLE 5: Build Shared Ownership: *Engage, don't just involve*

As you seek to engage the community in your work, look for opportunities for the community to become vested in your work and its impact. Identify opportunities for leadership roles for members of the community and engage them as decision-makers and owners of strategy. Actively seek their guidance and input in evaluating and refining strategies and messages.

Best Practices:

1. Build and maintain the relationships you begin. Are workshop graduates happy about the results of the program? Ask them to be spokespeople and work with you to engage others in their community.
2. Incorporate what you learn from your experiences into your workshop. Do people seem to be less engaged in any of the sessions? Ask *them* how you can make it more engaging or applicable to them.

PRINCIPLE 6: Walk Your Talk: *Lead by example*

All of us have had experiences in which the message conveyed by an organization is inconsistent with its actions and behaviors. A classic example is a retail business with a huge welcome sign in the window and a staff that ignores you. If you say that your programs are flexible, open to all members of the community and based on community needs, then that must be what your audience experiences.

Best Practices:

1. Acknowledge the reality of your organization. Do you reflect the community in which you live and the people you serve? Does your program align with the cultural values and serve the needs of the community? If not, what changes can you make?
2. If you have a board or community advisory committee for Living Well, invite someone from your priority populations to join to provide perspective and help make authentic connections.

PRINCIPLE 7: Relate, Don't Translate: *Place communication into cultural context*

Successful multicultural communication requires more than just translating English-language content. It requires embracing the social nuances of diverse cultural groups and markets, and actively engaging them in the creation of relevant communication strategies, tools and messages that have the best opportunity to achieve the desired action. In fact, more important than choosing which language to use in your materials is ensuring that the content resonates with the culture and identity of your audience.

Best Practices:

1. Determine whether your marketing materials work for the audience. Translated materials may need to be rewritten so the language and message are culturally relevant. By engaging with community partners, you can determine what works and what doesn't, and revise accordingly.
2. "Relate" the existing concept to the needs of your audience. For example, are the images and text meaningful to your audience? Are the materials easy to use (i.e., can they easily be copied from color to black and white)?

PRINCIPLE 8: Anticipate Change: *Be prepared to succeed*

Bringing in new people and new perspectives, especially those from a cultural group that has not been previously engaged, will naturally change the dynamics of your group or organization. It may change how the organization is structured, governed and staffed. It may affect how consensus is built, how meetings are managed and how decisions are made. It may affect how a product is reformulated, or how a marketing campaign is planned and executed. When conducting multicultural communication, answer the questions: "Are we prepared to succeed?" "Are we ready for change?"

For example, in some communities the need to process information and hold several conversations before driving for a decision is very important. To drive through an agenda with new information and immediately push for a decision would create distrust and distress. Embrace the change and see the value in new approaches. Be patient with the change process. Don't be afraid to ask for feedback from the community members.

Case Study

A Living Well program began partnering with a local tribe to offer workshops for tribal members. The local program provided coordinator support (non-tribal, from a local agency) and marketing materials after spending several years building relationships with tribal members and staff (see Appendix A (1).

Marketing to Potential Participants

The workshops offered were aimed at the tribal community at large, with referrals coming from tribal health services. To better engage the target community in workshops, the local agency brought together a team of tribal Living Well leaders and a nurse at the health center. This small group took about a month to revamp the county's existing Living Well brochure to include more appropriate language and photos that would be more salient for tribal members. In coordination with a local (non-tribal) communications coordinator, the group also developed media releases that were pitched to tribal newspaper and radio staffs.

As a result, the Living Well workshop was filled, and partnerships between community agencies and the tribe were solidified.

Self-Management Jargon Buster

Getting Back to Basics: What Is Self-Management?

Individuals that know and love Living Well understand what we mean when we use the term "self-management." But what does that term really mean and how can we, in our efforts to recruit individuals for workshops, describe the concept in a way that is easily understood by the general public?

For the purposes of Living Well, we can use the following to define self-management:

You have the power to take control of your health. By focusing on your health now, you will not only see immediate results, but will also set yourself up for a healthy future. You can live the life you want and gain the ability and confidence to care for your condition. Self-management means:

- Working with your doctor as your health care **partner**.
- Getting **support** from family and friends when you need it.
- Knowing how to **work through problems** that may arise, such as pain, fatigue, frustration or depression.
- Learning how to **eat well** and be **physically active**.
- Understanding how to **use medications correctly** and **assess new treatments**.

Elevator Speech/Talking Points

It is often difficult to describe the Living Well program in just a few sentences. Sometimes it may be easy to describe Living Well to professional partners—but challenging to talk about Living Well in a way that really resonates with potential participants.

Elevator Speech

Living Well with Chronic Conditions is a workshop for people with lifelong health conditions such as heart disease, arthritis and diabetes. The six weekly sessions cover things like pain and fatigue, eating well, fun ways to get active, and tips for talking with your doctor and family about your health. It's also a great way to meet other people dealing with similar health issues.

Talking Points

To Participants

Living Well with Chronic Conditions is a workshop for people with lifelong health conditions, such as heart disease, arthritis and diabetes.

The six weekly sessions cover things like pain and fatigue, eating well, fun ways to get active, and tips for talking with your doctor and family about your health. It's also a great way to meet other people dealing with similar health issues.

It works: Participants have less pain, more energy and fewer hospitalizations.

Living Well is supported by [insert your organization's name] and the Oregon Health Authority/Department of Human Services, and is led by trained volunteer leaders who have health conditions themselves. There's also a culturally appropriate, Spanish-language version called Tomando Control de su Salud.

(If time allows) People really love the workshops. For example, [insert a quick testimonial or story about a real person who took the class and has seen real benefit].

You can find a workshop near you on our website,[insert your website or OHA's website] or by calling [phone number].

Testimonials

Often, potential participants are more compelled by individual stories than by statistics and numbers. Reading or hearing a first-hand opinion from a real person makes the information authentic, credible and more engaging. Testimonials from participants in Living Well—particularly from those in your community, county, region or state—can be a powerful way to engage potential workshop participants.

Individuals who are directly involved with Living Well often hear these success stories through participants in the program. It is really inspiring to hear about a person's newly found ability to take control of his or her health and life. The more testimonials you are able to gather, the more perspectives you will be able to share. Here are some tips for taking a success story and making it compelling for potential workshop participants.

Who To Ask for Testimonials

Workshop Participants

- At the last workshop session, ask participants to share feedback on how Living Well has affected their lives (see Appendix A (2) for a Testimonial Form). If you have access to e-mail addresses, consider sending them the form after the workshop so they have some time to think through the questions.
- Encourage participants to share specifics about what they most enjoyed about Living Well with Chronic Conditions, and what lasting benefit they have seen.
- If participants approach you and provide positive feedback, use that opportunity to ask them if they would consider providing testimonials. Or write down what you heard them say, share it with them and see if they will agree to let you use it.
- If you keep in touch with past participants, ask whether they're continuing to use what they learned, and if they would be willing to talk about how what they learned helped them make lasting changes in how they care for themselves.
- Be sure to seek out a wide range of participants—different ages, genders, conditions, backgrounds—and be sure to include people from Tomando Control de su Salud if you offer that program.
- Ask participants if their spouses, partners or support systems would be willing to write a testimonial. Spouses or supports can often be big motivators for folks to sign up and stick with the program, and can speak to the relational aspect of supporting someone with chronic conditions.

Host Sites

- Ask your host sites to talk about why they offer the program, the benefits they see, and the opportunity/invitation for community members to join.

Health Care Providers

- Ask local, respected doctors or other health care providers to endorse the program and the benefits they've seen it offer their patients. A great comment from doctors is that Living Well is a perfect complement to patient care, helping patients follow their advice and live a healthy life that supports their medical treatment.
- Use provider feedback to show the importance of the workshop and how people can experience positive changes, from a professional's perspective.

How To Gather Testimonials

- Interview your testimonial source using the Testimonial Form in this toolkit to guide you, or come up with your own list of questions based on your knowledge of the individual's role as a workshop participant or member of the community.
- Pass out the testimonial form and ask individuals to fill it out.
- Don't over edit—make sure the testimonial maintains the person's real voice.

What To Do With Testimonials

- Take each testimonial you receive and pull out the most compelling statements. Organize it into one to three sentences.
- Include testimonials in newsletter articles, presentations, websites, media interviews and other opportunities to talk about the program.
- Keep your testimonials on file so you can pull quotes and information when needed.

Sample Testimonials

This six-week workshop emphasized practical problem solving and setting goals that are in reach. It's really helped me get better at managing my diabetes. Before the class, my blood sugars were all over the place. Near the end of the class they were mostly in the normal range.

The class is a great idea to get older adults like me motivated. I was so tired before, and now I have more hope about the future. We shared lots of good ideas to overcome pain and fatigue, or at least learn to deal with them better.

I came as support for my wife and was very impressed with what we learned. I would recommend this type of class for all older people. There were a lot of problem-solving ideas that everyone can use to help with their daily lives.

It has been so helpful to be able to think about my life goals through this workshop. It was such an eye-opener to be able to check out all of our options for healthy living. It has been great to re-learn how to set priorities!

Spokespeople

When working with the media, it is beneficial to have spokespeople lined up and prepared to be interviewed if a reporter is interested in writing a story. You can also use spokespeople in community presentations and other outreach forums. This section will describe ways to identify spokespeople and prepare them with messages for talking about Living Well with Chronic Conditions workshops.

What Type of Person Will Speak Best to the Issue?

Doctors/Nurses: Medical professionals can make a significant impact on the audience, as they are knowledgeable and trusted sources.

Community Partner: Who are the partners in your community that host workshops? Ask an authority figure at your location to be your spokesperson.

Audience Connection: Considering key audiences, including "unusual suspects" and people experiencing disparities, who will be most influential in reaching them? It may be a culturally appropriate care provider, a community leader, a faith leader, a cultural organization, etc. If they believe in what you are doing and see a need in your community, they may be willing to speak to the need for self-management and support it, even if they can't directly endorse your workshop. (See the section on multicultural marketing and communication.)

Workshop Participant: Have you noticed a participant who is especially excited about the workshops? Has a compelling story? Has shown a remarkable improvement over the six-week session? Ask that person to speak about his or her personal experience.

Workshop Leader: Leaders have first-hand perspectives on what the workshops are like, the gains participants make, and the lasting benefits.

Spouse, Child, Parent, or other Social Support of a Participant: The people who are closest to the participants are often the ones who will notice the biggest change from the workshop, and can speak to the positive effect that the workshop has on all facets of a person's life.

How to Prepare Your Spokespeople

Ask them:

- Why is the Living Well program beneficial to people's health?
- Why did you get involved?

- How have you seen Living Well help people with chronic conditions?
- Would you be willing to be interviewed by the media if they are interested?

Make sure to have their contact information ready in case a reporter wants to talk to them.

Give them the appropriate tools:

Provide them with the messages below to use as a reference guide. Ask them to share this basic information in their own words, with their own stories and enthusiasm. Ask them to be prepared to talk about what the program means to them personally, what benefits it offers, and why they would encourage people with chronic conditions and/or community partners to become involved.

Messages

What is Living Well with Chronic Conditions?

Living Well with Chronic Conditions (the Stanford Chronic Disease Self-Management Program) helps people with chronic conditions live a full, healthy life. It is for people with any lifelong health condition, from arthritis to diabetes to anxiety.

- The six-week workshop is fun and interactive.
- Builds confidence around managing your health, staying active and enjoying life.
- Free or low cost.

What difference does it make in people's lives?

For workshop participants:
After living with a chronic condition for the last [XX] years, the Living Well program gave me control over my health and helped me to feel better in my day-to-day activities.

- Learning how to set reasonable goals helped me make real progress and celebrate my achievements.
- Everyone participating in the workshop has a different chronic condition, but many of us deal with the same challenges of pain, stress, and relating to our family and friends. That common experience helps us work through the challenges together.
- I have noticed positive changes in my health, including:
    - [list out specifics: more energy so I can keep up with my family, better balance so I have less falls, etc.]

For workshop leaders:
Facilitating Living Well workshops has really helped me see the power that this program has on improving people's lives.

- [list out success stories based on real-life workshop participants]

Not only have I seen positive changes in the participants in my workshops, it has also helped me work toward my own health goals. Having to share my own action plan every week really gets me motivated between sessions.

For medical professionals/community partners:
According to the Centers for Disease Control and Prevention (CDC), chronic diseases are the most common, costly and preventable of all U.S. health problems. They are also the leading causes of death and disability, responsible for seven out of 10 deaths each year.[1]

- In [county], [number/percentage] have a chronic condition[2].

Teaching people to take care of themselves and live well with their conditions can make a significant difference. Living Well is an evidence-based program developed by Stanford University that does just that. People who have participated in a Living Well workshop have shown significant improvements in their health, including:

- Increased exercise.
- Improved communication with their doctor and family about their health condition.
- Increased energy.
- Improved mobility and movement.
- Increased ability to be more active and social.
- Learned and applied skills to manage overall health.
- Fewer outpatient visits and hospitalizations.

I've seen my patients who participate [insert first-hand observations about program impact].

Call to Action—what we want the audience to do

Living Well workshops are available across the state, and I highly encourage people with chronic conditions to learn more and sign up. More information can be found at:

- [Include your website or a link to the state's site - http://www.healthoregon.org/livingwell or by calling [phone number to sign-up for class].

[1] http://www.cdc.gov/chronicdisease/overview/index.htm
[2] To find this information refer to http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/Documents/healthor.pdf

News Release Template

FOR IMMEDIATE RELEASE

[Date]

Contact:[Name]
[Phone]
[E-mail]

Living Well Workshops Help [county/city] Live Better with Chronic Conditions
Sessions help people reduce pain, increase energy and be in control of their health

[CITY], OR—For people with chronic health conditions, good medical care is just half of the equation. Equally important is their ability to make healthy decisions, follow their doctor's recommendations and take care of their condition.

Living Well with Chronic Conditions, a workshop offered in [county], teaches people with lifelong health conditions to do just that. Participants have less pain, more energy and fewer hospitalizations.

The classes, offered weekly at [location] through [date], are for anyone with a chronic disease. [If applicable: A culturally appropriate, Spanish-language version called Tomando Control de su Salud is also available.] Chronic diseases are lifelong health conditions and include diabetes, arthritis, HIV/AIDS, high blood pressure, depression, heart disease, chronic pain, anxiety, multiple sclerosis, fibromyalgia and others.

There's a significant need for support for people with chronic diseases, which the Centers for Disease Control and Prevention calls the most common, costly and preventable of all U.S. health problems. They are also the leading causes of death and disability, responsible for seven out of 10 deaths each year.[1] [Include county/city specific data from Keeping Oregonians Healthy[2]].

"The good news," says [local instructor, partner or program administrator], "is that people who know how to take care of their health conditions can live successfully with their disease. The Living Well workshops are a wonderful complement to medical care, equipping people to live well outside the doctor's office so they can make the most of their treatment and live the lives they want."

Living Well workshops and Tomando Control de su Salud, the Spanish-language version, are delivered in six two-and-a-half-hour weekly sessions. They are taught by two certified leaders; either one or both are non-health professionals who have a chronic disease themselves and can speak from their own experience.

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[1] http://www.cdc.gov/chronicdisease/overview/index.htm
[2] http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/Documents/healthor.pdf

[Insert a quote from a local leader that explains why they got involved and the benefits they see the workshops offer participants. For example: "It is amazing to see the transformation that occurs after people go through the workshop," says [local leader]. "People are more confident, energetic and have a new support system in place, all of which helps them lead a healthy life."]

During the six-week session, participants receive support from trained leaders and other workshop participants, learn practical ways to manage their pain and fatigue, learn about nutrition and exercise options, understand new treatment choices and learn better ways to communicate about their conditions with doctors and family members.

[Insert a quote from a participant about the positive benefits they have experienced from taking the workshop].

Living Well with Chronic Conditions was created by Stanford University's Patient Education Research Center and is supported by the Oregon Health Authority/Department of Human Services. The state's goal is to put healthy options within reach for all Oregonians, and offering these self-management workshops is a way to ensure that people with chronic diseases have the support they need to access those options and live well. Other chronic disease self-management programs include Tomando Control de su Salud, a Spanish-language, culturally appropriate version, and the Positive Self-Management Program, a workshop for people with HIV.

For information on workshops in your area, visit [include website] or call [phone number].

# # #

Pitching a Story to the Media

This tool will give you an overview of the steps you should take to pitch a story to the media. Use the other materials provided in the toolkit to work through each of these steps.

1. Customize the news release.
   - Add information that is specific to your county.
   - Gather quotes from local Living Well participants, leaders, influencers, etc., which will add impact about the benefits of participating in Living Well.

2. Find the reporter(s).
   - Determine if your local media outlets have reporters who are specifically assigned to issues related to health. Call or look on their websites first, as the release will be much more effective if sent to the appropriate person. Most outlets will list topics assigned to each reporter.

3. Send the release via e-mail.

4. Follow up with a phone call to introduce yourself as a resource, emphasize the importance of this story to the media's audience, and offer some good stories to tell. For example:

   a. **Personality Profile:** Is there a local leader who is passionate about the workshop and has experienced benefits first hand?

   b. **Personality Profile:** Is there a local workshop participant whose health has dramatically improved as a result of the Living Well Workshop? Ask if you can share his or her story with the media. In addition to individuals, look for couples, siblings, groups of friends and others who might make a good story—and illustrate the social nature of the workshops.

   c. **Health Information:** Do you have a good relationship with a local doctor who can do an interview on the impact of chronic conditions and the great benefit of participating in Living Well or Tomando Control de su Salud?

   d. **Health Information:** Keep an eye on the media and watch for articles that are relevant to Living Well. Use these as a hook for sharing your information. For example, if a national study is published about the benefits exercise has on a chronic condition, use this to show the national, big-picture trend and provide information about your community to show the local impact.

   e. **Workshop Profile:** Invite a reporter to come to your workshop and see first hand the process and impact on workshop participants. Check with participants first to make sure they don't mind having a reporter present.

5. Provide any requested information or interviews.

6. Follow up to see if the reporters have everything they need.

7. Once the article runs, share it through your communication channels and with your community partners.

8. Send the reporters thank-you e-mails, which will give you an opportunity to include any additional information that may be helpful for them and remind them that you are available as a resource.

Op-ed Template

Taking Control of Our Health for a Better Tomorrow

By [identify a local doctor, workshop leader, Living Well program coordinator or respected community leader to sign this op-ed]

Learning that you or a loved one has a health condition that will never go away—such as diabetes or arthritis—can be scary. It can also be a positive wake-up call and an invitation to learn how to live well.

Across Oregon, and in [county], people are learning how to manage their chronic health conditions by participating in the Living Well Program, or Tomando Control de su Salud, the Spanish-language version of the program. It is delivered in a series of classes taught by trained community members, many of whom have chronic conditions themselves.

It's a proven program, developed at Stanford University and supported by [insert name of organization] in collaboration with the Oregon Health Authority/Department of Human Services. And it works. Participants have less pain, more energy and fewer hospitalizations. They are able to live the lives they want, and gain the ability and confidence to care for their condition.

This is especially significant when we consider the magnitude of chronic disease. Nationally, 80 percent of older adults have at least one chronic condition, and 50 percent have at least two. This compares to [X] in [county]. In 2005, diseases such as cancer, heart disease, lung disease, diabetes and arthritis claimed the lives of 19,219 Oregonians and resulted in $1.4 billion in hospitalization costs.[1]

Much of this could be prevented or lessened by eating well, moving more, avoiding tobacco use and getting regular health screenings, and we have to create communities that put those healthy options within reach for everyone.

In the meantime, for the many people who already have chronic diseases, and for those diseases we can't entirely prevent, it's critical that we help our residents live well with their conditions. Our county is fortunate to host Living Well workshops that teach people with chronic conditions to take the best care possible of themselves and, in many cases, lessen the impact of their symptoms or of the condition itself.

[Add something personal from a leader or a doctor. For example: I started co-leading Living Well workshops after taking one myself and seeing the improvement in my health. [Insert brief points about how your health has improved if desired]. I applaud [insert name of local licensed or

[1] http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/Documents/healthor.pdf

sponsoring organization] for offering these workshops, and I strongly encourage people with chronic conditions to participate.]

Living Well helps participants learn skills to deal with issues such as fatigue, frustration, pain and isolation. Leaders teach exercises that help maintain strength and flexibility, and provide information on properly using medications, communicating with health care providers, and evaluating new treatments.

On top of the new skills they gain, participants often form relationships that last beyond the workshops, creating a support system across the community. Their entire family often benefits, too, as participants bring home new ideas for living well and integrate healthy behaviors into their routine.

It's this kind of support that makes it possible for individuals to live well, for communities to embrace health and disease prevention, and to reduce the demand on our health care system.

I hope we'll continue to invest in Living Well workshops, education and changes in our community to help everyone eat better, move more, avoid tobacco and care for their individual health conditions. Together, we can all live well.

Workshops are open to all adults, of any age, with a long-term health condition and their support people. Workshop information and other resources can be found at [www.healthoregon.org/livingwell].

[Name]
[Organization]
[Title]
[Phone]
[E-mail]

Public Service Announcement (PSA)

Pitch to Radio Station

Contact your local radio station and ask to speak to the PSA or community affairs director. Give that person your elevator speech, stressing the prevalence of chronic disease in your community and the positive benefits of the Living Well with Chronic Conditions workshop, and ask him or her to consider reading your PSA on the air regularly.

Invite them to say "brought to you by [station]" if they agree to use the PSA. Send a "thank you" letter to the station, which will not only remind the PSA director of your ask, but also help strengthen your relationship and may lead that person to support you again in the future.

Script
:30 seconds

Do you have a chronic health condition like diabetes, arthritis, high blood pressure, heart disease or depression? Put life back in your life! Consider a Living Well with Chronic Conditions Workshop, now available in [county/city]. Workshops provide tips on reducing pain and fatigue, eating better, making exercise fun, talking with your doctor and more. For details visit [website] or call [phone number]. That's [repeat phone number]. Living Well with Chronic Conditions—your pathway to less pain, more energy and living the life you want. A message from [your organization] and [radio station, if they become a sponsor].

Guide to Calendar Listings

Calendar listings in your local media outlets are a helpful way to share information about your Living Well with Chronic Conditions and Tomando Control de su Salud workshops.

Every media outlet has a different process for submitting information to its calendar. Scan the website first to see if it lists "Events." Next, click on "Contact Us." Often, the e-mail address for submitting will be listed here. If you don't find anything, send an e-mail to the general e-mail address with "Calendar/Event Listing" in the subject line. You can also look in the newspaper and see if there is information on how to submit a calendar listing.

Most outlets have guidelines for submitting calendar listings. Make sure to familiarize yourself with them before you submit to make sure your information will get posted.

Common information includes:

1. Event title
2. Date, day and time of event
3. Location
4. Address
5. City and ZIP code
6. Phone number
7. Website
8. Cost (if any)
9. How can people register
10. Brief description about the event

Example:

Living Well with Chronic Conditions Workshop

Event Date:	Weekly, April 4 – May 9, noon to 2:30 p.m.
Location:	Cherry Blossom Senior Center 10615 SE Cherry Blossom Dr. Portland, OR 97216
Cost:	Free

Put life back in your life by participating in a Living Well workshop. If you or someone you care for has a chronic condition such as diabetes, arthritis, HIV/AIDS, high blood pressure, depression, heart disease, chronic pain, anxiety, multiple sclerosis or fibromyalgia, these workshops can help you take charge of your life.

You'll get the support you need, find practical ways to deal with pain and fatigue, discover better nutrition and exercise choices, understand new treatment choices and learn better ways to talk with your doctor and family about your health.

To register, visit [http://healthoregon.org/livingwell]

Advertising in Media

Local publications often will not want to write about the same topic more than a couple of times per year. Another way to use media is to run advertisements with essential program information. Advertisements can make Living Well a more standard household name in the community, and there are often many opportunities within the media landscape to place an ad. Although ads can cost money, some local businesses/media outlets may provide Living Well programs with a reduced cost or free ad as a donation to the program. See examples of ads in Appendix A (4) and A (5).

Consider placing an ad in one of the following:

- Newspapers
- Magazines
- Radio
- Television
- Local coupon books
- Placemats at local restaurants that include advertisements for local businesses
- Local grocery store
- Pharmacies
- Water closet advertising (in bathroom stalls)
- Transit—bus stops, posters on buses, etc.

Engaging Health Care Providers

Many people who live with chronic conditions interact with the health care system on a regular basis. Patient referrals into Living Well workshops are one way to engage potential workshop participants.

However, many health care providers have not heard of Living Well and will first need an introduction to what the program is, where it is available in the community, and who is teaching the workshops before they will begin to refer their patients. Once they're convinced and ready to refer, it will be important to help create a referral system that is easy, automatic and integrated into the organization's regular work flow.

Marketing to Patients in Health Care Settings

You may use some of the resources in the Marketing to Potential Partners section of this toolkit to approach health clinics, hospitals and other providers with the specific aim of generating patient referrals into workshops. However, many health care providers are very busy, so for some, sending an informational letter (Appendix A (6)) in the mail may be a good first step in building a relationship.

Some Living Well programs in Oregon have developed marketing materials specifically for health care providers to use with their patients. You may also consider giving health care providers a copy of the *Living a Healthy Life with Chronic Conditions* book, along with some detailed information about the workshop itself. The book can then be left in a waiting room or in the exam room for patients to read. See Appendix A (7) for an example of how Living Well has been presented to health care providers.

Prescription and Referral Forms

Some Living Well programs have developed referral forms (Appendix A (9)) that health care providers can complete and send over to the local Living Well program via mail or confidential fax. This is one method to ensure that patients who are referred to the program receive adequate follow-up and are able to register for an upcoming workshop.

Working with a Health Care Provider for Targeted Outreach

A helpful strategy for targeted outreach includes contacting one health care provider directly. Providers are a trusted source of information, and getting a personalized referral directly from one's provider can help to empower and move patients to consider Living Well. Providence Medical Group's Education Department partnered with a supportive doctor to send a personalized letter to patients diagnosed with one or more chronic conditions. The letter introduced Living Well and encouraged the patient to consider enrolling in an upcoming workshop. This resulted in a significant number of patients enrolling in the workshop. A letter template can be drafted in the provider's name and voice with his or her approval, then quickly and easily personalized through a mail merge and sent to each patient's home.

Following Up with Health Care Providers

Doctors, nurses and other health care providers are busy people. If they took time away from the few important minutes with a patient to provide a referral to Living Well, it is important to find a way to say thank you. Many health care providers state they believe in the Living Well program but don't often hear if their patients are actually attending after receiving a referral. If the patient does attend, health care providers are interested in hearing what impact the Living Well workshop had on the patient's health and health knowledge.

Some Living Well programs in Oregon have developed provider notification forms that the participant completes at the end of the workshop series (Appendix A (11)). Participants can either send this information directly to their health care provider, or a Living Well workshop coordinator can send this information on to the referring health care providers. These forms can be included in the patient's chart for future reference at each doctor's visit. As an added bonus, when a health care provider hears good news about a particular program, like Living Well, and that it was beneficial to their patient, they are more likely to provide ongoing referrals to the program.

Electronic Marketing Tools

The majority of adults now use the Internet, and most of those use it daily. The use of websites to research health information is common, as is the use of social networking sites like Facebook and Twitter. Baby boomers and other older adults are among a growing population of people connecting with each other and with information over the Internet.

Approach your community partners and ask if they would be willing to send information about your workshops out through their communication channels. Content can be formatted for newsletters, websites, e-mails, etc. See Appendix A (12) for an example.

Sample Copy

Living Well with Chronic Conditions Workshops Put Life Back in Your Life
Are chronic pain and fatigue keeping you from doing the things you love?
Take charge of your health and learn how to manage your condition.

People living with chronic conditions know the impact these conditions can have on everyday life. Normal activities can become a challenge. The Living Well program is in our community and available to teach you how to manage your condition so you can live a fuller life. You'll learn how to reduce pain, increase energy, follow your doctor's instructions and do the activities you love. Most participants have fewer hospital visits.

To learn more or find a class in your area call [phone number] or visit [website].

Who are these workshops for?

Anyone with a chronic condition, which is a condition that affects your health for a long period of time, perhaps even the rest of your life. Some examples include:

- Diabetes
- Arthritis
- Asthma
- Cancer
- High blood pressure
- Depression
- Heart disease
- Chronic pain
- Anxiety
- Multiple sclerosis
- Fibromyalgia

What is covered in the workshop?

The Living Well workshop takes place over six weeks, with one 2.5-hour class held each week. Most workshops are low cost or free. They are hosted by community organizations and taught by trained leaders, many of whom have chronic conditions themselves. Participants will:

- Receive support from trained leaders and other workshop participants.
- Learn practical ways to manage their pain and fatigue.
- Learn about nutrition and exercise choices.
- Understand new treatment choices.
- Learn better ways to communicate with doctors and family members.

About Living Well with Chronic Conditions

Living Well is an evidence-based program developed by Stanford University's Chronic Disease Self-Management Program and supported by the Oregon Health Authority/Department of Human Services.

This kind of support is especially important because, according to the Centers for Disease Control and Prevention, chronic diseases are the most common, costly and preventable of all U.S. health problems. They are also the leading causes of death and disability, responsible for seven out of 10 deaths each year.[1] By taking good care of their health and condition, people can reduce symptoms and even lessen the severity of their condition.

[1] http://www.cdc.gov/chronicdisease/overview/index.htm

Guide to Using Social Media

Social media, or media used for social interaction, is a great way to communicate with potential and current Living Well workshop participants. By using just a few simple online tools, you can share information, keep up with the latest news and trends, and position yourself as a reliable information source as you communicate with your audience.

Two of the most popular social media tools are Facebook and Twitter. When you post updates to Facebook and "tweet" on Twitter, you **encourage a conversation and provide information** other people can share with their own communities. That leads to more fans and followers, and a **rapid spread of your message**.

Don't let social media be intimidating! Start slowly, test things out, visit other pages and ease into it. If you are new to social media, spend a little time just poking around and seeing how others do it. Become a fan of organizations you are interested in and watch how they share information.

NOTE: Check guidelines for social media before using it at work and/or creating pages for your programs.

How to Use Facebook for Your Living Well Workshop

Facebook Terms

Profile page: Your personal profile. Sign up for an account at http://www.facebook.com. Search for your friends and become a fan of organizations and topics that interest you.

Wall: Where you post your information. You can add a status (e.g.: Heading out to lead my Living Well workshop! If you are interested in learning how to self-manage a chronic illness, come join us!), links, videos, pictures, etc. When you post something to your wall it will appear as a live feed, so anyone who is your friend will see it.

Fan page: A fan page represents an organization, business, etc., and acts similarly to an individual's profile page. If you are an administrator to a fan page, you can send out a message to all of your followers, post updates to your wall, share events, post pictures, etc.

Become a fan of the Living Well Facebook fan page (http://www.facebook.com/OregonLivingWell) and post exciting things that are happening in your classes, tips, upcoming class schedules, etc.

Setting up a Facebook Fan Page

1. Create a Facebook profile page at www.facebook.com. If you know you will be creating a fan page, we recommend setting up a generic account (in addition to your personal account if you have one), since you will have to tie your fan page to a profile page. Once you create a fan page, it will forever be tied to the profile page you use, so linking it to a generic name will let others in your organization take it over without giving up your personal page. (For example, use your first name and a colleague's last name to create a generic identity for the page. This name will not be visible to followers.
2. Create a new Facebook fan page: facebook.com/pages/create.php.
3. Build up your fans. Search for other like-minded organizations (i.e., the Stanford University Patient Education Resource Center, Facebook pages of chronic disease organizations, chronic disease support groups, etc.); once on their fan page, click "Add to My Page's Favorites." This is a good way to increase visibility and cross-promote organizations. Also ask all your friends to "fan" you!
4. Once you have at least 25 fans, visit http://www.facebook.com/username/ to claim a custom URL for your page (i.e., http://www.facebook.com/SmokefreeOregon).
5. Build out your page with as much information as possible, such as contact information, pictures, etc.
6. Set aside 10 minutes a day to monitor activity on your fan page. Respond to posts and update your wall.
7. Share the link to your fan page. Post it on your website, add it to newsletters, etc.
8. You can add other people to be administrators of your fan page. This means multiple people can be monitoring the page and posting information. Just go to "Edit Page" and click "Add Admins."

How to Use Twitter for Your Living Well Workshop

Twitter allows you to post quick updates (called "tweets" and only 140 characters or fewer in length) that answer the question, "What are you doing?" This posts for your friends (also called "followers") to see.

Twitter is unique in that it allows you to connect with people and organizations that you might not normally exchange information with. For example, you can "follow" organizations, media outlets, celebrities, etc. This allows you to cast a wider net when spreading your message and also gives you access to information that you find interesting. Simply enter a search term for an organization or topic you are interested in and click on those you would like to follow. Also, if you are looking to follow an organization, you can visit its website since many organizations post their Twitter names on the main page.

If you are following the Centers for Disease Control and Prevention (@CDCgov) and it posts a message about the importance of self-management for people with chronic diseases, you can

"retweet" that message and have it broadcast to your followers. Likewise, if the CDC is following you and you tweet about something it finds interesting, it can retweet your message and carry it beyond your network.

Setting up a Twitter Account

1. Visit www.twitter.com to create an account.
2. Add a picture and a short bio about your organization.
3. Send a tweet:
    - Write a message (must be 140 characters or less).
    - Anyone who is signed up to follow you will receive your message on his or her Twitter feed.
    - Retweet something interesting that you saw someone else post.
    - Try other Twitter-related desktop applications like HootSuite.com and TweetDeck.com. They let you view your page in different ways and have features like an automatic URL shortener to help keep tweets under 140 characters.
4. Find people to follow. Once you start following people, they will often start following you.
    - Do a general search on Twitter to find people and organizations.
    - Visit www.twellow.com. This site allows you to search by subject area and find people you may want to follow.

What Information Should You Share Through Social Media?

Some ideas for information to share on Facebook and Twitter:

- **Newspaper articles:** Scan the news for stories that relate to self-management, chronic disease prevention and even stories about specific chronic diseases. Post a link to the news site simply by inserting the URL.
- **Upcoming workshops:** Post to Twitter, create an "event" on Facebook and post the information on the Oregon Living Well Facebook Fan Page.
- **Celebratory news:** Share exciting and interesting things that are happening in your workshops, as well as relevant upcoming events in your community. For example, is there an Arthritis Walk in your community for Arthritis Month? Use this hook to share information about the importance of being active.
- **Observations and conversation starters:** Excited about a new development? Wondering why something's happening? Post it and ask for comments.
- **Pictures:** Post pictures of your workshops or other relevant events and invite your friends to do the same.

How to Create a Word-of-Mouth Referral Program

Graduates of Living Well are great messengers, as they have been through the workshop and have experienced the benefits first hand. Encouraging them to share their experience and promote the workshop will bring great value to your future workshops, as they are often your best (and cheapest) recruitment source. Word of mouth can be particularly useful in small or rural communities. People are much more likely to trust advice from friends and family members than advertisements or other materials.

There are a few ways to get people talking about Living Well in your community.

1. Pass out Living Well referral cards or brochures at your last workshop and ask participants to share with their friends and family.

2. Take it a step further: Have them write their name on a referral card or the brochure provided at Session Six and ask them to pass it along to someone they think could benefit from the program. Some leaders have also asked the current workshop participant to write their name on the card, so that when their referral shows up for a workshop, their name can be entered into a drawing for a prize. Offering a prize is a great way to incentivize word-of-mouth referrals! Ask a local company to donate a gift certificate or small prize to use for the drawing.

3. Take it even further: Workshop participants that want to stay involved in the program don't only have to become leaders. Consider taking on participants as volunteers to conduct word-of-mouth marketing efforts in the community.

4. Develop postcards that workshop participants can send to a friend or family member about their experience. Include information, such as a phone number and website, about how the postcard recipient can sign up for a workshop themselves.

5. Ask participants to become fans of the Living Well Facebook page (http://www.facebook.com/OregonLivingWell). Once they are fans, ask them to suggest the page to their friends and family who could benefit from the workshops.

6. Ask participants if they belong to civic clubs, senior centers, churches or other organizations that might be interested in having a program coordinator or workshop leader speak about the program.

Zero Session

Sometimes, offering a “zero session” or “class zero” is an appropriate way to give your target audience a real taste of what Living Well is all about. Some programs have found that offering a zero session has led to improved participant retention because the participants have a better understanding of what Living Well is all about before they commit to signing up.

Zero sessions can be particularly useful with organized groups or communities—such as support groups, retirement facilities, faith-based organizations, or other settings where groups already congregate.

The following zero session outline was developed by a group in New Jersey that implements the Living Well program.

Zero Session Outline

My name is [_____]. I am here to tell you about a workshop for people with chronic conditions, or people who are supporters or caregivers for someone with a chronic condition. This workshop will help you live a healthier life.

Some of the examples of chronic conditions are:

- Heart disease
- High blood pressure
- Diabetes
- Osteoporosis
- Lung diseases
- Arthritis

These conditions may cause pain, fatigue, isolation and emotional distress. Good health is soundness of body, mind and spirit. To live a healthy life with a chronic condition means working at overcoming the physical and emotional problems caused by the disease. It is good to control the disease instead of the disease controlling you!

Living Well will give you tips and ideas to make your life easier. This is a program that was developed by Stanford University in California.

We’d like to offer this workshop to you here at [name of organization].

Living Well is being held in many places in the United States, as well as in other countries of the world. It has helped people feel better about themselves and their problems. Because of this workshop, people gain more physical capabilities and pleasure from life.

This workshop will help you:

- Understand the problems caused by your condition.
- Manage your health condition.
- Learn activities to do to have better general health.

This workshop does not deal with each chronic disease, such as diabetes or high blood pressure, individually, but rather with how different techniques can be used to manage a variety of chronic health issues.

Living Well is a fun workshop with a lot of activities to do in groups.

You will learn:

- How to solve problems.
- How to deal with emotions.
- How to breathe better.
- How to relax.
- How to deal with pain and fatigue.
- How to have healthy eating habits.
- How to communicate with others.
- How to use medications correctly.
- How to manage depression.
- How to work with your health care professionals.

Living Well is an evidence-based program. That means that a study was done with about 1,000 people who had heart disease, lung disease, a stroke or arthritis. These people were followed for three years. The study looked at:

- Changes in pain, fatigue, shortness of breath, and depression.
- Visits to physicians and to emergency rooms, and hospital visits.
- Level of confidence in managing health conditions.
- Use of self-management behaviors in taking medications, doing exercise, eating healthy foods, using community resources, and communicating with doctors.
- Managing stress.

The results of the study showed that people who took this workshop did better in all of the areas than those who didn't attend the workshop.

The Living Well with Chronic Conditions six-week workshop would meet weekly on a day that is convenient for you. The workshop meets for 2-½ hours each week and includes a break. Each workshop will have 8-15 people.

Please sign the list that is being passed around the room if you are interested in the program.

Thank you for having us here to meet with you today.

Do you have any questions or comments about the program?

If time permits, demonstrate an activity, such as action planning, guided imagery, or breathing exercises.

SECTION 3

Financial Sustainability

Section Three: Overview

Why Financial Sustainability?

Imagine that Living Well is a standard part of the health and social services system in Oregon, covered by insurance, offered by employers, integrated into all primary care clinic and hospital discharge processes, and built into long-term budgets and multiple funding streams. Knowing that it was funded for the long term, we could focus on expanding the program to make it accessible to every Oregonian with a chronic condition, as intrinsic a part of our culture as Weight Watchers or walking shoes. This is the goal: financial sustainability.

For hands-on people whose primary interest is delivering community workshops, investing time and energy in establishing financial sustainability for Living Well may seem unappealing. However, it is essential for the long-term viability of programs in Oregon. If the issue of financial sustainability is not addressed, Living Well programs run the risk of losing financial support when funding gets tight or grant priorities change. Experience has shown that even brief lapses in funding can have major implications for programs like Living Well that rely on referrals from health professionals and the positive regard of the public.

In the last decade, self-management program delivery in Oregon has evolved from a handful of organizations providing a few Living Well, Tomando Control de su Salud and PSMP workshops to a thriving network of statewide partners that provide programs to thousands of Oregonians per year. The Living Well brand is increasingly recognized by local, regional and statewide policymakers, and chronic disease self-management is an increasingly recognized component of health care reform. Now is the time to build on this progress and make Living Well programs permanent. Unfortunately, many local and regional partnerships supporting program delivery rely on time-limited grant funding to underwrite salaries for key coordinator positions, provide stipends for leaders and support leader training.

During the recent economic crisis, even as new partners offered programs for the first time, many other organizations were forced to cut back on the number of programs they provided due to reductions in staffing and volunteer support. Support provided by the Oregon Department of Human Services and Oregon Health Authority for training and technical assistance is also time-limited, and is intended to assist establishment of self-sufficient, sustainable programs statewide over time.

The experience of the Oregon Tobacco Quit Line described in the sidebar demonstrates how difficult it can be to reestablish trust in a program when funding lapses and

An episode in the history of a free, publicly funded tobacco cessation support service shows why financial sustainability is crucial. When funding to the state Tobacco Prevention and Education Program was cut during the state budget crisis of 2003, the Oregon Tobacco Quit Line lost funding and service was discontinued for several months. Word traveled quickly among potential callers and health care providers who regularly referred patients, and even after service resumed, it was several years before call volumes and provider referrals to the Quit line returned to their original levels.

workshops go on hiatus, even briefly. It is more important than ever to establish funding streams that will assure potential program delivery partners, referral system partners, and potential participants that Living Well programs are dependable resources that will be available long into the future.

Financial backing for programs will be most sustainable when supported through policies at the local, statewide and/or national levels. With federal and state reform reshaping Oregon's health insurance, care delivery and information systems, now is the time to ensure that this important resource is preserved for years to come.

What Is Financial Sustainability?

Researchers have defined overall program sustainability as "the extent to which an evidence-based intervention can deliver its intended benefits over an extended period of time after external support from the donor agency is terminated."[1] *Financial* sustainability refers to the financial aspects of programs that contribute to this long-term goal of overall sustainability. Programs that have developed these aspects are not solely dependent upon time-limited (grant) funding; they have established sources of funding that are viable over the long term.

Research indicates that financially sustainable programs share several characteristics:[2,3]

- They strategically and continually **seek a diverse array of resources** to support their programs.
- They establish their programs as a priority in the view of their funders and advocates, and **incorporate their programs within existing delivery systems and funding streams**.
- They **provide a quality product** and work to **increase and demonstrate demand** for their programs so the need for sustainable funding is clear.
- **They engage in early financial planning** as part of an overall strategic plan, and keep expenses as low as possible through conservative spending and creative use of volunteers and in-kind support.

Although financial planning and cost management are outside of the scope of this document, they are important aspects of financial sustainability for Living Well programs. The University of Kansas Community Toolbox at http://ctb.ku.edu/en/tablecontents/sub_section_main_1297.aspx is a helpful resource. Providing a quality product is the focus of the Living Well Network Quality Assurance and Fidelity Workgroup; more information on how to achieve this goal is available online at http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Pages/fidelity.aspx.

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1 Rabin, BA et al. (2008). A Glossary for Dissemination and Implementation Research in Health. *Journal of Public Health Management and Practice*, 14(2), 117-123.

2 Gordon C and Galloway T. *Review of Findings on Chronic Disease Self-Management Program (CDSMP) Outcomes: Physical, Emotional & Health-Related Quality of Life, Healthcare Utilization and Costs*. US Centers for Disease Control and Prevention and National Council on Aging, 2008.

3 *Lessons Learned on Sustainability of Older Adult Community Mental Health Services.* Substance Abuse and Mental Health Services Administration and US Centers for Disease Control and Prevention, 2011 [in press].

The following section of this toolkit focuses on the first two bullets above; read on for more information and resources.

How-To: The Pathway to Financial Sustainability for Your Program

The overarching goal for this work is to ensure that Living Well programs across the state are supported by **strong, ongoing revenue streams** so that people with chronic conditions can access this resource consistently and reliably. Ultimately, the opportunity to participate in the Living Well program should become a standard part of health and health care—something available to everyone with a chronic condition.

In this section of the toolkit we focus on a step-by-step approach to this goal:

1. **Crafting a persuasive case for support:** clarifying what we're asking for and why our audience should care.
2. **Developing a prioritized prospect list:** identifying your potential funders.
3. **Engaging advocates for funding:** finding the most appropriate people to carry your message to prospects.
4. **Making a plan:** clarifying who will do what, and when.
5. **Making the ask:** approaching potential funders to ask for support.

This process is actually quite similar to the way you find grant funding and program partners, and the strategy and tools outlined in this section and the next will support that ongoing work. However, the end goal is to secure sustained, long-term funding by embedding Living Well in an ongoing stream as part of a standard delivery of care.

This emphasis on financial sustainability is crucial. It is also new for many Living Well program partners and may take time to show results. Please put these tools to work and reach out if you need help. The Living Well Network Financial Sustainability Workgroup is a great resource. For more information, please visit www.healthoregon.org/livingwell or contact the Oregon Health Authority Living Well program at 1-888-576-7414.

What Is My Role in Financial Sustainability?

Although this section of the toolkit is geared toward local and regional coordinators, it will also be helpful to anyone involved with making Living Well programs a reality in Oregon. No matter what our role, we all can contribute.

In addition, when you start thinking about talking to top decision-makers about funding and program support, it's important to coordinate internally to ensure that you respect existing relationships and avoid duplicating efforts. Following these guidelines can help:

- Reach out to partners to create your case, brainstorm potential sustainable funding models for your community, and identify prospects and pathways (see steps and tools below).
- Check in with other Living Well coordinators in your area to see if they are planning to approach any of the same partners and might be open to a joint pitch for support.
- Work within your organization and the Living Well Network to find out whether there are relationships you might tap into or other activity or plans you should know about. For example, if you learn that your administrator is already talking to a potential funder, you might be able to integrate the requests—or at least ensure that you coordinate your outreach.

Step 1: Crafting a Persuasive Case for Support

Potential supporters of the Living Well program—whether internal advocates, pathways, or external funder prospects—will respond best when it is clear to them:

- Who you are.
- Why the program is needed.
- Why the program is effective.
- Where you hope the program will go.
- What investment is needed, and when.
- How their investment will be used.
- What the impact will be.

These answers are summed up in your **case for support**, a brief, compelling statement of the need for effective self-management programs and proof that Living Well addresses that need. It defines the core messages to be used in all your funding outreach.

Think of the case for support as the foundation document for any request to be made on behalf of the Living Well program—presentations, proposals, appeal letters, etc. It's the main message you will deliver whenever you have the opportunity to obtain sustainable funding. *A customizable **case for support** for the Living Well with Chronic Conditions program is included in section 3.2.a of this toolkit.*

INTEGRATE FINANCIAL SUSTAINABILITY MESSAGES INTO ALL COMMUNICATION

It is critical that all communication reinforce the message that:

- Living Well is a valuable, high-impact program that costs $___ to provide per participant.*
- It relies on the generosity of funders who make the program available for no or low cost (name them).
- The goal is for Living Well to be a standard part of care—something everyone with a chronic condition can access—that is built into hospital discharge, primary care and insurance coverage.

Make sure to include these messages on your website; in program brochures, fliers, posters and ads; videos; presentations; and in the classes themselves (verbal acknowledgment as well as in any printed materials). This provides multiple benefits: It is an opportunity to thank those funders who've already committed, leverages those funders to inspire others, highlights the need for continued funding for the program, and builds an internal culture that respects the need to solicit support for the good work you are doing.

*A survey conducted in 2009 identified an average program delivery cost in Oregon of $375 per participant. For more information on identifying the cost of delivering Living Well in your area, please see the National Council on Aging's cost calculator and cost calculator manual (linked under "Other Resources" at http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Pages/resources.aspx). For assistance using the calculator, contact the state Living Well program at 1-888-576-7414 or living.well@state.or.us.

The case for support document takes a step beyond the "elevator speech" discussed in section 2.5 by including information about your program's local impact and specific financial support needs.

Once you have the general case, you can customize it for specific asks to align with your prospect's interests and values. Please see the talking points and issue briefs for hospitals, insurers and employers for additional information you might include in your case when reaching out to those particular groups.

Step 2: Identifying Who to Ask

Once you've outlined a clear general case for supporting Living Well programs, it's time to think more specifically about potential funders, or prospects.

See the information on potential funders in Appendix C for a list of possible sources, some background information on how they operate, thoughts on why they might support Living Well, what kind of support they might provide, and how to get in the door. This appendix addresses the following types of funding sources:

- Hospitals
- Employers
- Health insurers, including:
    - Commercial health insurance plans.
    - Medicaid managed-care organizations.
    - Medicare Advantage plans.
- Other sources: aging service providers and participant fees.

Using that information, start thinking about the various potential funding sources for your program. Some of these prospects may have strong relationships with you; some may never have heard of Living Well, but have a similar mission or areas of shared interest. Some may not be in a position to fund the Living Well program directly, but may have great influence. In some cases, you may know exactly who needs to hear your case; in others, you'll need to ask around a bit to learn more and find the right person.

Keep in mind that finding potential organizational partners to work with is like starting any new relationship; it's important to take the time to establish whether you are compatible before either can realistically expect too much commitment. However, looking for similarities in your organizations' mission statements is a good way to initially identify potential partners.

You will also need to do some investigation into which funding streams outlined in the appendix are available in your community. It is important to have a sense of the overall health care and insurance landscape in your area, and to be aware of relationships between organizations and who's competing for business. See the specific sections on sustainability partner organizations for tips.

Keep in mind that just as there is no perfect partnership model for delivering self-management programs in all of Oregon, there is no single best way to achieve the goal of financial sustainability for all local and regional Living Well programs in the state. Because of the tremendous local and regional variability across the state, organizations engaged in financial sustainability planning will need to use their best judgment regarding the most appropriate means to make their programs financially sustainable.

Your job is to think through the range of potential funding models, figure out who the decision-makers would be for each, identify the relationships you have with those people, and identify the best ways to move ahead. Here's how:

Develop Your List

Think about **prospect list development** like a target, with ever-expanding circles of connection and influence. Consider the three levels of supporters you can recruit to help you:

- Internal advocates: colleagues, supervisors, directors or administrators who can help you connect with the right people and support your efforts to advocate for funding.
- External pathways: those who may not be in a position to fund the Living Well program directly, but may serve as the connector to a potential funder by making introductions or giving endorsements.
- Funder prospects: those who you can ask to fund the program directly or to ensure that ongoing funding is committed for the program.

Use your Living Well brainstorming skills to generate a list of those who have the potential to incorporate Living Well into their funding stream and ongoing program model, or those who can help make connections to get the conversation started. *Answer the questions in the **Prospect Generator** in section 3.2.b to help guide your brainstorm.*

Prioritize Your List

Once you have a list of prospects and pathways gathered in one place, conduct an **"Identification, Qualification and Prioritization"** (IQP) session, preferably with a core group of people who are already involved with your program. Rate pathways and prospects for:

- Capacity to provide sustainable funding.
- Propensity (likelihood) to commit.
- Interest in providing support.
- Pathway to approach them and influence they may have on other organizations.

*Use the **IQP Session Template** in section 3.2.c to help capture your ratings and feedback.*

Look at the combined ratings and prioritize your top prospects and pathways, picking the best-ranked five to 10 to become your top prospects list. Through this process, you will know who is:

- Ready to be asked now.
- Involved with Living Well, but needs to know more.
- Knows about Living Well, but needs to be involved.
- Doesn't know the program and needs to be introduced.

Now that you have a short list of Top Prospects in hand, research a prospect profile for each, to include:

- Prospect name and contact information.
- Pathway and key relationships.
- Rationale (what makes this prospect a priority?).
- Funding interests/guidelines.
- Background (relevant information, program model and where Living Well could fit, etc.).
- Recommended approach (based on what you know or have learned about this prospect, what's the action item that makes the most sense?).
- Recommended team (who is best positioned to set the meeting and make the presentation/ask? Who will the prospect be most influenced by?).

*Use the **Prospect Profile Template** in section 3.2.d to help capture your ratings and feedback.*

Step 3: Engaging Advocates for Funding Outreach

To reach and engage your top prospects, you'll need to either already have a direct relationship with them, or to leverage relationships with people who have the capacity to offer their connections and resources to help you engage your top prospects.

For example, you may find yourself:

- Making a presentation about Living Well to your manager and asking him or her to make an introduction to a key administrator at a hospital that's on your top prospects list.
- Contacting someone you know from your county mental health services department to ask for help to brainstorm funding options.
- Asking a program leader to make an e-mail introduction to a program officer she knows from your local community foundation.

These are your internal advocates and external pathways—and they are invaluable in opening doors to potential funders.

Connect with these advocates and pathways to determine what level of support they are willing to give and how best to leverage their relationships. In a meeting:

- Provide a brief overview of the program and its impact (see the case for support in section 3.2.a), a brief statement of the need for sustainable funding, a description of how you envision

sustainable funding happening and the impact it will have. This presentation may range from something minimal for internal advocates who already know the program well, to something deeper for those who don't.

- Bring a specific, customized list of prospects (or even just one prospect) for whom the advocate or pathway may have information or influence.
- Ask for their help in ways such as:
    - Sharing information about key prospects.
    - Adding names to the prospect list.
    - Making introductions to potential funders or other influencers.
    - Attending selected cultivation and solicitation meetings.
    - Providing connections to major funders.
    - Championing the program overall.
- Thank them and be sure to follow up on all activities noted in the meeting.

Step 4: Make a Plan

Now that you know what you're asking for and who you'll approach for support, how do you make sure it all actually happens? Make sure to integrate key activities into your program's work plan and timeline to make sure they get accomplished. This document will be based on the needs of your audiences and the goals you have set out to accomplish, and the availability of your advocates and pathways.

Ideally, your work plan and timeline will specify the activities that need to happen, who's responsible, when they need to be done, what resources are needed to support them, and any important notes. Set realistic timelines that have been agreed to by the people involved. To reduce duplication of requests to potential financial partner organizations, consider engaging with the members of the Living Well Financial Sustainability Workgroup as you develop your work plan.

For example:

Action Item	Lead	When	Resources Needed	Notes
Presentation to Debbie Smith, CEO, Smart Hospital	Julie Adams, with support from Amy Williams	4/1/11	PowerPoint presentations, talking points, brochure/documentation to leave behind	Debbie Smith is the sister-in-law of Amy Williams

Track activities by date, and make sure the lead is aware of his or her responsibilities. Integrate the topic of financial sustainability into your regular meeting agendas to report on progress. *Consider using the **Work Plan-Timeline Template** in section 3.2.e to help capture activities.*

Step 5: Making the Ask

Getting the Meeting

- Make an initial outreach call to respectfully ask for an opportunity to meet briefly to share information about the Living Well program, the benefits it offers and how the prospect might help it have even more impact. Be prepared to speak briefly about the program in case they want more information before accepting a meeting. Keep it brief, and focus on why you think the prospect would be interested in hearing about the program. Use the talking points in the appendix of funder options (Appendix C) as a guide.
- If the prospect is willing to meet, offer times and find out if anyone else should join the discussion.
- If the prospect is unwilling to meet, respectfully ask why. Depending on his or her answer, it may mean he or she is unwilling to meet right now (maybe they're just busy and you could call back in a month) or simply needs more information (in which case, provide it). Or it could mean the prospect is not a good fit for funding your program, in which case you can thank him or her for the time and move on to another top prospect. If appropriate, ask that person if there are other prospects you should be contacting.

Preparing for the Meeting

- Learn as much as you can about the person you will be meeting with. Know if he or she already hosts or supports Living Well or a similar program, and be clear about how it will benefit him or her to make Living Well sustainable. Also, research the person's role within the organization—is this individual someone who can be a good champion for program funding? Is he or she the final decision-maker?
- Determine who from your team will attend the meeting. Who will have the most relevant connection with the person/people you're meeting with? Who can make the strongest case for the program and the importance of long-term financial stability? How many people will you be meeting with, and how does that balance with the number of people you're planning to bring?
- Determine who may have influence with the people you're meeting with, even if they aren't attending the meeting. Can your influencer make a supportive phone call before or after your meeting?
- Determine who will say what. Clarify roles and assign talking points. Brainstorm anticipated questions or objections, and practice responses. Remember that you are there to listen more than talk, so plan an agenda accordingly (e.g., for a one-hour meeting, plan a maximum of 30 minutes of presentation and leave lots of time for questions and discussion).
- Determine what materials you will leave behind, such as a customized print version of your presentation, customized cover letter, brochure, issue brief, case for support, budget, relevant case studies, and/or media stories. Make sure materials are customized, proofread and presented in a logical, organized format.

Conducting the Meeting

When the door opens for a discussion with a potential funder, use the opportunity to build a relationship, obtain information, gauge interest, and engage the prospects in the program and its impact. This likely will not mean making a direct funding request at the first meeting—or even the second or third meeting.

Cultivation of relationships with potential funders can take time and should be seen as a process of discovery, a time to ask questions, listen, and learn about the prospect's needs, values and motivations. It is also a time to infuse the prospect with your enthusiasm and inspire that person through real-life success stories from the program.

- Acknowledge prior involvement in or support of the Living Well program.
- Establish mutual interest in the program's success.
- Make the case using the case for support as a guideline for talking points.
- Be prepared to share a story from a real participant (see the **storytelling tool** in section 3.2.f for assistance).
- Encourage discussion and answer questions.
- Mention others who have supported the program.
- If/when the time is right, make the ask.
- If the answer is no, politely ask about concerns and what might help to overcome them (additional information, etc.).
- Ask for "leads" to other leaders or organizations you could talk with.
- Follow up:
    - Within 24 hours: Send meeting notes to relevant parties, send thank-you letters, and reach out to advocates who can help influence this ask.
    - Within one week: Send follow-up package restating the case/the "ask" and responding to key comments/questions raised in the meeting.
    - Within three weeks (if no response has been received, unless the prospect identified a different timeline): Follow up with a phone call to discuss next steps or to negotiate this funding

For assistance with financial sustainability

Again, building financial sustainability for your program is hard work that takes time to show results—and is new for many Living Well program partners. The Living Well program staff at the Oregon Health Authority (OHA) is a great resource, as is the LW Network Financial Sustainability Workgroup. Contact OHA at 1-888-576-7414 to get connected to the workgroup, or visit http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Pages/network.aspx workgroup minutes and information. Thank you for your great work and dedication to these programs!

TOOLS YOU CAN USE FOR FINANCIAL SUSTAINABILITY

General Financial Sustainability Tools

Section 3.2.a	Case for Support
Section 3.2.b	Prospect Generator
Section 3.2.c	IQP Session Template
Section 3.2.d	Prospect Background Template
Section 3.2.e	Work Plan-Timeline Template
Section 3.2.f	Storytelling Tool
Section 3.2.g	Financial Sustainability Prospect Presentation Template
Section 3.2.h	Financial Sustainability Prospect Presentation Notes
Appendix B	Chronic Disease Prevention and Management Model Benefit
Appendix C	Potential Organizational Partners for Financial Sustainability

Handouts: Living Well with Chronic Conditions Issue Briefs

Appendix C2, p.139	Hospitals
Appendix C3, p.147	Employers
Appendix C4, p.153	Insurers

Talking Points for Specific Audiences

Appendix C2, p.144	Hospitals
Appendix C3, p.151	Employers
Appendix C4, p.164	Insurers

Oregon Living Well Impact Report
http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Documents/Living Well Program Impact Report Final.pdf

Case for Support

Your case for support helps you clearly communicate ***what*** *Living Well is,* ***why*** *it matters, what* ***impact*** *it makes, and* ***how*** *sustainable funding will make it even more effective.*

Personalize the yellow highlighted sections in this case for support with specific information about your program, then use it as the basis for your outreach, presentations and funding requests. Pair it with the talking points and issue briefs for specific audiences (hospitals, employers, insurers) (Appendix C) to be sure you're addressing their unique needs.

The Problem: Chronic Diseases are on the Rise

Chronic diseases—heart disease, stroke, cancer, diabetes and arthritis—are among the most common, costly, and preventable of all health problems in the U.S, according to the Centers for Disease Control and Prevention. Half of all Americans have at least one chronic disease, and seven in ten U.S. deaths each year are from chronic diseases.[1]

Every year in Oregon, chronic diseases claim the lives of 19,219 people and result in $1.4 billion in hospitalization costs.[2] In addition, they cause countless missed work days.

[Add local data here from *Keeping Oregonians Healthy*, Appendix C.[3]]

Much of this could be prevented or lessened by creating communities where everyone can eat well, move more, avoid tobacco use and obtain regular health screenings. In the meantime, for the many people who already have chronic diseases, and for those diseases we can't entirely prevent, we must help Oregonians live better with their health conditions.

A Solution: Helping People Live Well with Chronic Conditions

Living Well with Chronic Conditions is a workshop that helps people learn to take good care of themselves, creates a supportive environment and builds community. The goal is to help them avoid unnecessary hospitalizations, make medical treatments more effective and improve their health.

The six-week, evidence-based program was developed by Stanford University and is supported by the Oregon Health Authority. There's also a culturally appropriate, Spanish-language version called Tomando Control de su Salud, and a seven-week version for people living with HIV/AIDS called Positive Self-Management.

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[1] http://www.cdc.gov/chronicdisease/overview/index.htm
[2] Oregon Department of Human Services. *Keeping Oregonians Healthy*, 2007. http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/Documents/healthor.pdf
[3] *Keeping Oregonians Healthy* (see note 2 above).

Participants learn how to deal with issues such as fatigue, frustration, pain and isolation. They learn exercises that help maintain strength and flexibility. They gain information on properly using medications, communicating with health care providers, and evaluating new treatments.

Dozens of organizations offer Living Well workshops around the state, and more than 5,600 Oregonians have participated in the program so far. Workshops are available in 27 counties, and an online version is being piloted.

Here in XXX county/city/town/area, Living Well is offered [insert specifics about number of classes, locations, how long the program has been offered, etc.][4]

Return on Investment and Health Care Savings

Living Well works. Participants have less pain, more energy and fewer hospitalizations. Relationships with fellow participants last beyond the workshops, creating a support system across the community. Entire families often benefit, too, as participants bring home new ideas and integrate healthy behaviors into their routines.

A review by Dr. Viktor Bovbjerg, associate professor of public health at Oregon State University, estimated that the program has helped participants avoid more than $7 million in medical costs due to emergency room visits and hospitalizations. Dr. Bovbjerg recommends making Living Well accessible to more Oregonians and incorporating it into health reform efforts.

Help Expand this Successful Program

It is with this potential for better health and lower health care costs in mind that we ask for your help in making the Living Well program a standard, funded part of our health care system. Our vision is that Living Well will be covered and available just like clinic visits or hospitalization.

Currently, the Oregon Health Authority and Oregon Department of Human Services (DHS) support leader training through funding from the Centers for Disease Control and Prevention and the Administration on Aging. However, delivery of local programs like ours is underwritten locally, through grants and in-kind support from community organizations.

Here in XXX County, most of our funding comes from [annual grants from XXXX, etc.] This short-term, patchwork approach to funding means there is little financial stability to the program and a strong need of more long-term partners to support it.

To ensure that Living Well is accessible to all Oregonians with chronic diseases, please consider [adding classes to your standard offerings, adding Living Well to your covered benefits, providing Living Well to all patients, etc.].

[4] Living Well county-level reports: http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Pages/pubs.aspx

Financial Sustainability

With your support, the Living Well program can help make it possible for individuals with chronic health problems to live successfully, for communities to embrace health and disease prevention, and to reduce the demand on our health care system.

[Close with a testimonial from a program participant saying what an impact Living Well had on his/her quality of life, and/or from a health care provider talking about how much the program helps patients and makes his/her work more effective]

For More Information

You can find more information by visiting our website at [insert your website or OHA's website[5]] or by calling [phone number].

[5] http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Pages/Index.aspx

Prospect Generator Worksheet

The prospect generator worksheet is a series of questions to help you identify potential champions, pathways and funder prospects, starting with those closest to you and moving to those who may not know you yet.

This exercise helps you think through the various levels of relationship your organization has with people and organizations that have the potential to become significant donors or champions for your program. It is designed to help you cast your net wide and create a large list of possible supporters you will then more carefully evaluate for capacity, propensity, interest, influence and pathway.

1. What funding opportunities exist for Living Well?

2. How do we get in front of them?

- Who are the ultimate decision-makers?
- Who influences these decision-makers? Would they be willing to be a champion for your program?

3. Who is already connected to Living Well?

- Who are the colleagues, supervisors, directors or administrators who can help you connect with potential funders?
- Can these people also advocate internally for the Living Well program?

4. Who is already in your funding or social network?

- Who currently funds your program?
    - Have you engaged them in the dialogue about needing a strengthened, sustainable revenue stream for the Living Well program?
    - Have you talked to them about creating a long-term funding strategy?
    - Have you talked to them about introducing you to other relevant funders?

- Can they help you publicize the need for sustained program funding?

- Who is volunteering for the program? Who are the past advocates (staff and non-staff) for the program?
  - Do the individuals named above work for the prospective funder? Can they introduce you to decision-makers?
  - Would they be willing to champion the program in their circles?

5. Who is operating in your community?

- What nonprofits in your region or area of focus are working on similar projects or issues?
  - Who funds them?
  - Would they be willing to connect you with their funders?
  - Is there a partnership opportunity? Are they seeking to contract with someone to help achieve a mission or enhance their capacity to complete a project? Would they be able to help publicize the need for ongoing financial support for Living Well?

- **What governmental bodies might be focused on issues similar to your areas of interest?**
  - Are any of the above agencies looking for someone to contract with to provide needed services to their constituents?

- **What local companies sell to the broader health care field?**
  - Have you ever reached out to them? If yes, what was the result? If no, why not?
  - Even if the company is not in a position to fund your program, over whom do they have influence? Can they serve as a champion for the program to other potential funders? Can they help publicize the program?

- **What companies are key players in the community and benefit from being positioned as supporters of a healthy community (largest employers, key beneficiaries of public investment, large community-wide customer bases, etc.)?**

IQP Session Template

Once you have a list of prospects and pathways, conduct an **"Identification, Qualification and Prioritization"** (IQP) session, preferably with a core group of people who are invested in your program. Indicate on the chart below:

- Prospect organization.
- Contact person at that organization.
- Who identified this person?
- Capacity: What is this organization's potential to provide sustainable funding? What might that look like? For example, could the prospect integrate the program as a standard line item in his or her annual budget?
- Propensity: Does the organization currently fund or support programs like this, or other innovative approaches to disease management? Does it have a recognized need to improve patient outcomes and/or reduce costs?
- Interest: Is the organization already engaged with the Living Well program in some way, or do its interests align with the program's mission?

Pathway: Do you know this contact person? Do you know others who do? Who can introduce you? Is this person a known leader in the field? Does he or she have the ability to influence others?

Prospect	Contact	Identified by	Capacity	Propensity	Interest	Pathway	Notes

Prospect Profile Template

Prospect Name:

Contact Information:
E-mail:
Phone:
Address:

Preferred method of contact:

Pathway/Key Relationships:

Ask Strategy & Rationale:
Why is this prospect a priority?

What are we asking for?

What are their funding interests and application guidelines?

Based on what we know/have learned about this prospect, what's the approach that makes the most sense?

Background:
Include brief notes about the prospect's history/biography, financial assets, philanthropic track record, etc.

-
-
-
-

Recommended Team:
Primary cultivator/contact:
Other volunteer(s):
Staff/support person:

Financial Sustainability Work Plan and Timeline

Create a work plan and timeline for financial sustainability activities that specifies what needs to happen, who is responsible for doing them, when they need to be done, what resources are needed to support them, and any important notes. Set realistic timelines that have been agreed to by the people involved. If you have a general work plan, these activities can be integrated into that document; if not, the template below will come in handy.

Action Item	Lead	When	Resources Needed	Notes

Living Well Storytelling Tool

Storytelling is a powerful way to illustrate the effectiveness of your program, show the potential for greater impact, and make a point about the need for sustainable funding. It also adds human appeal to your case and lets you get away from statistics and numbers.

Gather at least two stories from your local program to use in presentations, materials and other outreach. These might be profiles of people who have benefited from Living Well workshops, a leader who has seen changes in participants, a doctor who sees the benefits in his/her patients, an employer who refers employees, etc.

Good stories share several key elements. These are outlined below, along with questions to brainstorm as you build your story.

Elements of effective storytelling	**Questions to get you there**
Opening—Start with a compelling opening that grabs your audience's attention. Often unveiling a startling fact, sharing a great anecdote or saying the unexpected can do the trick.	Is there anything especially *touching*, *encouraging*, *unusual*, *compelling* or *ironic*? • What **benefit** can you illustrate? • What was the unexpected **outcome**? • What was the life-changing **impact**? • NOTE: Sometimes it's easiest to lay out your story first, then think about the opening.
Background—Provide just enough background information so that the reader can understand your story.	What are the *background elements* of your story that your audience needs to know? • **Who** is the person/people involved? • **When**, **why** and **how** did this person become involved in Living Well?
The Barriers—Good stories have a problem to overcome or an issue to be addressed.	What were the *main barriers* the person had to overcome? • What **caused** the person to seek out Living Well? • What **challenges** stood in the way? • What was **unexpected** or **surprising**?

The Opportunities—Good stories also provide hope.	What were the *opportunities, successes or ah-ha moments*? • What's good? What's working? • What **improvements** in health have materialized? • Who **benefits**?
What Now?—So what do we do with this new knowledge?	What *conclusions* can you draw? What *call-to-action* does this create? • What is **happening** now that wasn't happening before (better health, more movement, savings in health care costs, back to work, etc.)? • Who else can **benefit**? • What **advice** would the subject of the story give? • What can we do to **make this opportunity available** to everyone?

Other Tips:

- A good story can convey an important message and also be compelling—it doesn't have to be dry! Find ways to interject real people, anecdotes and quotes into your story.
- Use descriptive language so that your audience can put themselves in the story and try to understand it first hand.

Financial Sustainability

Putting It Into Practice

Use this grid to develop your success story. An example is provided, along with a sample story.

Questions
What are the background elements of my story that my audience needs to know? *Maria, in her late 50s, had poorly controlled diabetes. She had foot pain that bothered her, so she got little exercise, ate an average of 10 tortillas with each main meal, and struggled with her weight.*
What barriers existed? *She has two flights of stairs in her home, and it was getting more and more difficult to get to her bedroom. She also took a fall while walking her dog, and became afraid to leave the house or even to go to the grocery store less than a mile away.*
What's the good news? What opportunities, successes and ah-ha moments exist? *After Maria and a friend participated last fall in a Tomando Control workshop in Pleasantville, Oregon, through Pleasantville Senior Center, she got her physician's help in finding special shoes that have reduced her foot pain. She has started exercising regularly by walking her dog around the neighborhood, cut back to five tortillas a day (so has her husband!), and is losing weight. Her blood glucose readings are now mostly in the normal range.*
What now? Who else can benefit? How do we extend this opportunity? *Maria's best friend has asthma and attended the same workshop, and they now often cook and exercise together. Maria's church is interested in co-hosting Tomando Control classes with the senior center. The church is a major social hub for the local Latino community, and is a promising partner for extending the program to many un- and underinsured people, many of whom are living with chronic health conditions and get much of their medical care in the hospital emergency department. Workshops are currently funded by a grant that ends soon. Finding a funding source to make workshops available in the future would make a major positive impact in the health of the community of Pleasantville.*
Is there anything touching, encouraging, unusual, compelling or ironic about your story that might make a good introduction? *Maria enjoyed the workshops so much that she became a volunteer leader. She has now led three workshops. Because her diabetes is now well controlled, her physician cleared her to travel to her granddaughter's wedding in Mexico next month.*

Sample Success Story

Furry and human friends help Pleasantville woman manage diabetes

Maria Valdez had no idea how much of a dog lover she was until she got her diabetes in check thanks to the Tomando Control de Su Salud program.

Before enrolling in the program at the Pleasantville Senior Center last fall, Valdez, 55, had severe foot pain—a common complication of diabetes—and almost never exercised. She also struggled with her weight. When her dog, Rex, chased a squirrel while she was walking him in the park last fall, she fell. While she wasn't badly injured, the incident frightened her so much she didn't even want to go to the store for groceries.

But after Tomando Control de Su Salud taught her how to communicate effectively with her doctor, set safe, attainable exercise goals and eat more healthful foods, Valdez has noticed a lot of positive changes. She has new shoes designed to minimize diabetic foot pain that she wears for daily walk with Rex around her neighborhood. She even found companions for herself and her dog. She told a neighbor with asthma about Tomando Control, and they took the workshop together. Now they walk their dogs together every morning.

Valdez also gets her feet checked regularly, and all the exercise and better eating have helped lower her glucose levels and lose 20 pounds. She is also excited that her doctor has cleared her to attend her granddaughter's wedding in Mexico next month, with Rex taking part as ringbearer.

Another goal for Valdez is ensuring Tomando Control continues to be offered in her community, especially since she's become a volunteer leader. She believes a long-term commitment to Tomando Control by a partner organization in the community, rather than the short-term grants that support it now, will allow many others with chronic diseases to learn the benefits of self-management and share their own success stories.

For more information about Tomando Control, and opportunities for sponsors, contact the Pleasantville Senior Center at 541-111-1111.

Helping People with Chronic Diseases Live Well

A presentation to: [NAME]
Presented by: [NAME, AFFILIATION]

(Date)

Chronic Conditions

Consider the magnitude of chronic disease:

- The 27% of Americans with multiple chronic conditions account for 66% of health care spending.[1]
- Every year in Oregon, chronic diseases:[2]
  - Claim the lives of 19,219 Oregonians.
  - Result in $1.4 billion in hospitalization costs.
- [*Add local statistics here*]

[1] US Department of Health and Human Services. *Multiple Chronic Conditions—A Strategic Framework*, 2010.
[2] Oregon Public Health Division. *Keeping Oregonians Healthy*, 2007

Chronic Conditions (cont'd)

We can prevent or lessen these impacts through:

- Eating healthfully.
- Moving more.
- Avoiding tobacco use.
- Getting regular health screenings.
- Communicating better with providers, loved ones and caregivers.

We must create opportunities that put healthy options within reach of everyone.

The Living Well with Chronic Conditions Program

- Six-week workshop, 2-1/2 hours per session
- Free or low-cost to participants
  - Actual program cost is $375 [*or local cost*]
- Led by trained peers living with chronic health conditions

The Living Well with Chronic Conditions Program (cont'd)

The workshop teaches skills for managing chronic health problems:

- Setting achievable goals and problem solving.
- Dealing with fatigue, frustration, and pain.
- Maintaining strength and flexibility.
- Properly using medications.
- Communicating with health care providers.
- Evaluating new treatments.

Living Well ~ Impacts for Oregon

- More than 5,600 Oregonians have participated.
- Dozens of organizations offer workshops in 29 Oregon counties.
- Tomando Control de su Salud: culturally adapted, Spanish-language version.
- Helped participants avoid more than $7 million in medical costs due to emergency room visits and hospitalizations.

Living Well ~ Funding

Currently funded by time-limited sources:

- Oregon Health Authority/Department of Human Services
- US Centers for Disease Control and Prevention, US Administration on Aging
- [*Add local time-limited funding sources here*]

Living Well ~ Funding (cont'd)

Background:

The cost of delivering Living Well programs is not covered through state or federal grants.

The result:

- Programs are supported by strong local partnerships and aren't dependent on federal or state dollars.
- Programs must be "owned" locally, with long-term financial support.

Living Well ~ Funding (cont'd)

To ensure Living Well is accessible to all Oregonians with chronic diseases, and to make it a regular part of our health care system, we seek to invest:

- [*Add overarching uses of funds and amounts needed, over what time period*]
- [*Shoot for three to five bullets*]
- [*Customize based on your specific ask to your specific prospect*]

Living Well ~ Generating Support

We ask for your help in generating support for the program:

- Share with others what you've learned today.
- Advocate for funding for this program.
- Connect me with potential long-term funding sources.
- [*Customize based on your specific ask to your specific champion*]

Why It Matters ~ Hospitals

- Prevent unreimbursed hospitalizations and emergency room visits.
- Help patients improve communication with their health care providers.
- Provide a valuable community service by helping people with chronic conditions feel better, stay independent and increase energy and self-confidence.

What Hospitals Can Do

- Help support Living Well:
  - Sponsor workshops.
  - Host leader training and recruit volunteers to lead.
  - Refer patients and publicize programs.
- Make Living Well a standard health education offering:
  - Provide space and healthy snacks.
  - Underwrite scholarships.
- Make Living Well a routine offering at discharge and a standard employee benefit.

Why It Matters ~ Insurers

- Helps members avoid the emergency room and unnecessary hospitalizations.
- Help members improve communication with their health care providers.
- Shifts a portion of the health care burden off the delivery system while empowering and activating members.

What Insurers Can Do

- Incorporate Living Well into standard disease management offerings.
- Cover workshops as a primary benefit.
- Provide outreach and incentives to encourage members and employees to participate.
- Help support delivery of programs in local communities.

Why It Matters ~ Employers

- Build a healthier, more successful and productive workforce.
- Keep valuable employees at work.
- Prevent unnecessary worker's comp claims, emergency room visits and hospitalizations.

What Employers Can Do

- Make Living Well a standard employee benefit and encourage employees to use it.
- Ask your health plan and employee assistance program to include Living Well workshops as a covered benefit.
- Host Living Well workshops at your worksite. Publicize Living Well programs to your employees, and provide incentives for participation.

What Employers Can Do (cont'd)

- Develop flex time or sick leave policies that support employees in attending Living Well workshops.
- Encourage Living Well for family members of employees, and support employees in attending with family members.
- Support employees who want to be trained as Living Well leaders, through flexible work arrangements.

Thank You

With your support, the Living Well program can help make it possible:

- To reduce the demand on our health care system.
- For communities to embrace health and disease prevention.
- For people to **Live Well with Chronic Conditions**.

Thank you for your consideration!

Contact Information

[*Your name, title, organization*]

[*Your phone number*]

[*Your email*]

[*Local phone/web address for program information*]

Statewide program information:

1-888-576-7414

www.healthoregon.org/livingwell

Financial Sustainability Prospect Presentation Notes

Slide 1:

- Thank you for the opportunity to speak to you today!

Slide 2:

- Examples of chronic diseases include heart disease, asthma, diabetes and arthritis.
- Chronic diseases are taking a huge toll on our state and our health care system, and we feel their impact locally, too.

  [You can add local statistics about chronic disease here; Appendix C of *Keeping Oregonians Healthy*[1] has county-specific information on death rates, prevalence of chronic diseases, and prevalence of chronic disease risk factors.]

Slide 4:
Living Well is about teaching people practical skills for making use of healthy options and following through on their health care providers' recommendations.

Slide 5:
What makes Living Well different from traditional health education?

- Most people with chronic conditions have the "laundry list" of what they need to do, but they may not know how to get started
- Attending Living Well is like being given a tool kit and shown how to use the tools

Slide 6:
More than 600 leaders have been trained.
An online version called Better Choices, Better Health is being piloted in 2010-2011.

Slide 7:
Funding for Living Well programs from the state goes to county public health agencies to develop partnerships in the community to support Living Well.

The state provides program infrastructure, including a website, toll-free information line, training, marketing materials and statewide coordination.

[1] http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/Documents/healthor.pdf

Financial Sustainability

Slide 8:
We need your support to cover the cost of delivering programs and make this valuable program available long-term.

Slide 11:
The average cost to deliver the program is $375. Compare this to the thousands of dollars a hospital could spend on a single un-reimbursed admission or emergency room visit.

Slide 13:
The average cost to deliver the program is $375. Compare this to the thousands of dollars an insurer spends on avoidable emergency room visits and hospitalizations.

Slide 15:
The average cost to deliver the program is $375. Compare this to the cost of missed workdays and increased health care costs due to avoidable emergency room visits and hospitalizations.

Appendix

Living Well—Central Oregon

2577 NE Courtney Dr.
Bend, OR 97701
541-322-7430

www.livingwellco.org

1-888-576-7414
www.healthoregon.org/livingwell

Feel better.

Be in control.

Do the things you want to do.

Find out more about Living Well Workshops.

This program is offered in partnership with the Warm Springs Community Health Programs.

Living Well—Central Oregon is the collaborative, regional initiative that sponsors and supports the Chronic Disease Self-Management Programs developed and tested at Stanford University. This program is made possible through the cooperation, dedication and support of the following organizations.

Put Life Back in Your Life

Sign up now for a Living Well workshop!

Put Life Back Into Your Life.

Consider a Living Well with Chronic Conditions Workshop.

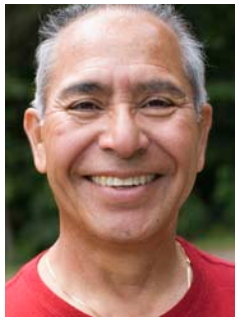
Chronic conditions include diabetes, arthritis, HIV/AIDS, high blood pressure, depression, heart disease, chronic pain, anxiety, multiple sclerosis, and fibromyalgia. If you or someone you care for has one of these conditions, the Living Well Workshop can help you take charge of your life.

You'll get the support you need, find practical ways to deal with pain and fatigue, discover better nutrition and exercise choices, understand new treatment choices, and learn better ways to talk with your doctor and family about your health.

Sign Up Now.

- Join us for this free, 2 and ½-hour Living Well Workshop, held each week for six weeks. Classes are fun and interactive.
- Learn from trained volunteer leaders with health conditions themselves about how to manage symptoms and medication, work with your health care team, set weekly goals, problem-solve effectively, improve communication, relax, handle difficult emotions, eat well, and exercise safely.
- Set your own goals and make a step-by-step plan to improve your health—and your life.

For more information about a Living Well Workshop in Central Oregon, please call 541-322-7430, or 1-888-576-7414
To register on-line visit www.livingwellco.org



"Now I have more energy than I've had in years. I'm calmer and more confident about my health."

"In just a few weeks, I got back to feeling better-and back to being the kind of person I want to be."

Share Your Story:
Workshop Participants

We would like to be able to share your story to help others living with chronic conditions learn about the Living Well workshops. (All questions are optional.)

Name _____

Do we have permission to use your first name? ☐ Yes ☐ No

E-mail _____

Phone _____

Signature _____

Why did you decide to take a Living Well workshop?

Now that you have completed the Living Well workshop, how has it helped you manage your chronic condition?

What were you hoping to gain from taking this workshop?

What differences do you see in your life now? (For example, in your physical health, emotional health, mental health? Social life changes?)

If you could describe Living Well in one sentence, what would you say?

Share Your Story:
Host Site, Health Care, and/or Social Service Provider

We would like to be able to share your thoughts in order to help people living with chronic conditions learn about the Living Well workshops. (All questions are optional.)

Name _____

Do we have permission to use your first name? ☐ Yes ☐ No

Organization _____

Title _____

E-mail _____

Phone _____

Signature _____

Why do you think Living Well is an important program?

Have you seen the impact on Living Well workshop participants? Please explain.

How do you think programs that promote self-management, such as Living Well, end up being more cost-efficient in the long run?

Put Life Back in Your Life

Living Well
with Chronic Conditions

Health and Human Services Department
Ann Way, MS
Living Well Coordinator

36 SW Nye Street
Newport, Oregon 97365

Telephone: (541) 265-0465
Fax: (541) 265-4113

RELEASE DATE: IMMEDIATE
CONTACT: Ann Way, MS, Living Well Program Coordinator

What is Living Well with Chronic Conditions?

Living Well with Chronic Conditions is a chronic disease self management program designed for individuals who have chronic conditions or those who live with or care for someone with a chronic condition. This self-evidence based program was developed by Stanford University in 1996.

Living Well is a workshop series delivered in six, two-and-a-half hour weekly sessions, primarily in community settings such as senior centers, churches, libraries and hospitals. People with different chronic health conditions or with multiple conditions, attend the workshops series together. Workshops are facilitated by two trained leaders who follow a specific agenda and curriculum. One or both of the leaders are non-health professional peers living with a chronic disease.

Living Well will not conflict with existing programs or treatment. It is designed to enhance regular treatment and disease-specific self-management education such as Better Breathers, cardiac rehabilitation, or diabetes education. In addition, many people have more than one chronic condition. The program is especially helpful for these people, as it gives them the skills to coordinate all medications and treatments necessary to manage their health, as well as to help them keep active in their lives. Family members and other support people are invited to participate along with the person living with a chronic condition.

Some of the subjects covered include: techniques to deal with problems such as frustration, fatigue, pain and depression/appropriate exercise for maintaining and improving strength, flexibility, and endurance; appropriate use of medications; communicating effectively with family, friends, and health professionals; nutrition and how to evaluate new treatments.

Each participate in the workshops receives a copy of the companion book, *Living a Healthy Life With Chronic Conditions*, 3rd edition. Sessions are highly participative, where mutual support and success build the participants' confidence in their ability to manage their health and maintain active and fulfilling lives. Healthy snacks are also provided at all sessions.

New workshops will beginning after the first of the year throughout the County. To take that first step to become a better self manager or for more information, please contact Ann Way, Living Well Program Coordinator, 541-265-0465.

Put Life Back in Your Life

Living Well with Chronic Conditions Workshops

If you have chronic conditions such as diabetes, arthritis, high blood pressure, heart disease, or other ongoing health issues, the Living Well with Chronic Conditions program can help you take charge of your life. The six-week workshop and book "Living a Healthy Life with Chronic Conditions" costs only $10.

Living Well is brought to you in partnership by:

Deschutes County Health Services
HealthMatters Central Oregon
Oregon Department of Human Services
PacificSource Health Plans
Northwest Health Foundation
Cascade Healthcare Community
Jefferson County Health Department
Clear One Health Plans
Mountain View Hospital
Mosaic Medical
Crook County Health Department

DESCHUTES COUNTY

To register and for more information, please call

541-322-7430

www.livingwellco.org

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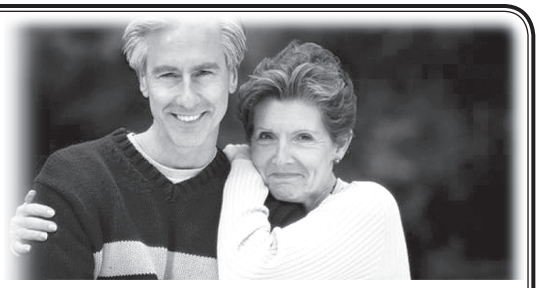
Put Life Back in Your Life

Living Well with Ongoing Health Issues Workshops begin Jan. 20.

If you have conditions such as diabetes, arthritis, high blood pressure, heart disease, chronic pain and anxiety, the Living Well with ongoing health issues program can help you take charge of your life. The six-week workshop and the book "Living a Healthy Life with Chronic Conditions" costs only $10.

Living Well serves the communities of Deschutes, Crook and Jefferson counties



Workshop series offered:
Jan. 20 - Feb. 28

Bend Workshop Times
(please call for class locations)
Jan. 20 to Feb. 24, *2 to 4:30 p.m.* (Thursdays)
Jan. 24 to Feb. 28, *2:30 to 5 p.m.* (Mondays)
Jan. 24 to Feb. 28, *6 to 8:30 p.m.* (Mondays)

For a complete list of Living Well sponsors or to pre-register, please visit
www.livingwellco.org

(541) 322-7430

DESCHUTES COUNTY

Put Life Back in Your Life

Living Well with Chronic Conditions

Health and Human Services Department
Ann Way, MS
Living Well Coordinator

36 SW Nye Street
Newport, Oregon 97365

Telephone: (541) 265-0465
Fax: (541) 265-4113

April 19, 2010

Dear Clinic Manager,

Enclosed is a copy of the book, Living a Healthy Life with Chronic Conditions. This book is given to all participants who attend the chronic disease self management program, known as Living Well with Chronic Conditions, in Lincoln County.

I offer this copy to you to place in your waiting room for patients/clients to see. If you have any questions concerning the book, or the actual workshop, please do not hesitate to contact me.

Enclosed you will also find a very short survey; we are beginning to increase our efforts and need to assess the knowledge level of care providers in Lincoln County. Please take just a few moments to answer the questions on the survey and return to Patty Meagher in the enclosed envelope.

Thank you, I appreciate your assistance,

Ann Way, MS
Living Well Coordinator

Put Life
Back in
Your Life

Living Well
with Chronic
Conditions

Chronic Disease Self-Management Program

Living Well with Chronic Conditions

The chronic disease self management program, Living Well with Chronic Conditions, is a **FREE** workshop for people caring for someone with a chronic health condition or someone who has a chronic health condition such as diabetes, asthma, emphysema, heart conditions, high blood pressure, MS, COPD, depression, and many others. Participants meet 2.5 hours per week for six weeks. Workshops are held throughout the many communities in our county in a variety of settings, such as senior centers, churches, libraries and hospitals. There is no charge for the workshop or book, Living a Healthy Life with Chronic Conditions.

Program Overview

- Working with your Doctor and other members of your health care team
- Medication "how to's"
- Personalizing a fitness program
- Relaxation techniques
- Dealing with negative emotions
- Managing your symptoms
- Improving communications with family, friends and others
- Tips for eating well
- Personal goal setting
- Effective problem-solving

Workshops help participants improve health and wellbeing while decreasing pain, stress, frustration, fear, fatigue, isolation and depression. Day to day management of your chronic disease improves through skills learned during the six week session.

Put Life Back in Your Life

To find a workshop in your area, more information, or to register call:
Ann Way, MS, Living Well Coordinator, 541-265-0465 or at away@co.lincoln.or.us

Referral to Living Healthy Program

FAX TO: Lavinia Goto (503)485-3224

Criteria: Living Healthy is a 6-week Chronic Disease Self-Management Program and teaches patients and their caregivers how to become an active manager of their chronic disease. Classes are open to MPCHPA, MPCHP OHP, and Physician Advantage patients. Patients must have the cognitive ability to participate in some capacity in the class. They are not required to be able to read. This class is designed for ADULTS. **Physician referral is required.**

Referred by: _____ Phone:_____ Date of Referral: _____

Reason for the Referral (please name the chronic condition(s)): _____
_____

Name of Patient: _____ DOB: _____

PCP/Physician: _____ Insurance Type/#: _____

Pt Address: _____ City: _____ Zip: _____

Phone #: _____ Alt#:_____ Email: _____

Caregiver Name: _____ Phone #: _____

- ☐ Yes, patient was given a brochure or information about the program
- ☐ No, patient was NOT given a brochure or information about the program

Referral to Living Healthy Program

FAX TO: Lavinia Goto (503)485-3224

Criteria: Living Healthy is a 6-week Chronic Disease Self-Management Program and teaches patients and their caregivers how to become an active manager of their chronic disease. Classes are open to MPCHPA, MPCHP OHP, and Physician Advantage patients. Patients must have the cognitive ability to participate in some capacity in the class. They are not required to be able to read. This class is designed for ADULTS. **Physician referral is required.**

Referred by: _____ Phone:_____ Date of Referral: _____

Reason for the Referral (please name the chronic condition(s)): _____
_____

Name of Patient: _____ DOB: _____

PCP/Physician: _____ Insurance Type/#: _____

Pt Address: _____ City: _____ Zip: _____

Phone #: _____ Alt#:_____ Email: _____

Caregiver Name: _____ Phone #: _____

- ☐ Yes, patient was given a brochure or information about the program
- ☐ No, patient was NOT given a brochure or information about the program

Put Life Back Into Your Life

Name _____

Referred by _____

From office/organization _____

☐ **Living Well with Chronic Conditions**
6-week workshop will help you learn ways to positively manage your chronic illness. For information, call 541-464-2812.

☐ **Family Caregiver Support**
Classes, support groups and resources to help you take care of yourself while caring for others. For information, call 541-440-3677.

☐ **Oregon Tobacco Quitline or Cessation Class**
Personalized help to quit smoking or chewing. For information, call 1-800-784-8669 or visit www.quitnow.net/oregon.

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From: Living Well with Chronic Conditions Program "Living Well"

Attached you will find information about **one or more of your patients** who attended the Living Well workshop in Linn or Benton County. Each completed at least 4 sessions out of the 6 in the workshop and was offered this opportunity to communicate back to you about their progress. I hope you will include this document in their chart.

This Self-Management course will not conflict with existing programs or your treatment plans. It is designed to help people learn basic problem solving skills and set short-term goals that help them manage their health and help them keep active in their lives.

Stanford University developed this evidenced-based program and you can find additional information at patienteducation.stanford.edu. In Oregon we call the program "Living Well" at Stanford it is called "Chronic Disease Self-management Program" or CDSMP. Their studies have shown a decrease in the number of office and emergency visits and a decrease in hospitalizations once a person completes the workshop series.

Enclosed are a few Living Well flyers and brochures. We are constantly scheduling more workshops. The workshops are free and each participant receives a copy of the book Living a Healthy Life with Chronic Conditions by Kate Lorig RN, PhD. et al.

If you, your patients or your staff would like more information please have them contact me at ckment@samhealth.org or 541 451-6466

Thank you,

Carole Kment, Health Educator
Living Well Program Coordinator
Samaritan Health Services
541 451-6466

Participant Name:_____ **Doctors Name:**_____

Living Well with Chronic Conditions classes held in:_____

Class Dates:_____ **Completed 6-week series:** ❑ **Yes** ❑ **No**

❑ Participant was contacted after referral, but did not attend. (See comments below.)

Chronic conditions I live with:_____

_____

I completed workshops in the following areas:

- ❑ Differences between acute and chronic conditions
- ❑ Using the mind to control symptoms
- ❑ How to make an action plan
- ❑ Problem solving skills
- ❑ Dealing with difficult emotions
- ❑ Physical activity and exercise
- ❑ Better breathing
- ❑ Muscle relaxation
- ❑ Pain and fatigue management
- ❑ Endurance activities
- ❑ My healthcare future
- ❑ Healthy eating
- ❑ Communication skills
- ❑ Medication usage
- ❑ Depression management
- ❑ Positive thinking
- ❑ Guided imagery
- ❑ Working with my healthcare professional

My current goals:_____

_____

Concerns/Additional comments:_____

_____

_____

_____

_____

Thank you,

_____ _____

Signature of participant Date

_____ _____

Leader Signature Date

Living Well with Chronic Conditions

Provider Notification

A Healthier State of Living

Chronic Disease Self-Management Program

Living Well

Sick and tired of being sick and tired?

TAKE CONTROL

The Living a Healthy Life with Chronic Conditions Self Management Program is a **FREE** workshop for people with ongoing health conditions such as diabetes, asthma, emphysema, heart conditions, high blood pressure, MS, etc. Participants meet 2.5 hours per week for 6 weeks in community settings such as senior centers, churches, libraries and hospitals in Linn, Benton and Lincoln counties. There is no charge for the workshop or book Living a Healthy Life with Chronic Conditions.

Program Overview

- How you can work with your Doctor and others on your health care team
- Medication "how to's"
- Personalizing a fitness program
- Relaxation techniques
- Dealing with negative emotions
- Managing your symptoms
- Improving communications with family, friends and others
- Tips for eating well
- Personal goal setting
- Effective problem-solving

Workshops help participants improve health and wellbeing while decreasing pain, stress, frustration, fear, fatigue, isolation and depression. Day to day management of your chronic disease improves through skills learned over the 6-week session.

Put Living Back in Your Life

For more information or to register (pre-registration required) call:
Carole Kment (541) 451-6466 or e-mail **ckment@samhealth.org**

Workshop at the Albany Senior Center will start on February 23 – March 30, 2011 at 12:30 in the large meeting room. Please call to register in advance of start date.

Chronic Disease Prevention and Management Model Benefit

Overview:
More than 31 percent of Oregon's employed, insured adults have an ongoing health condition like arthritis, asthma, diabetes or heart disease. Evidence-based chronic disease prevention, education and self-management programs can help contain health care costs, increase employee productivity and morale, and decrease absenteeism. Employees who take a more active role in their health and make healthier lifestyle choices will reduce the disabling effects of ongoing health conditions.

To help employees and dependents take charge of chronic conditions, provide the following evidence-based chronic disease management benefits or services:

Health Risk Appraisal
Annual health risk appraisal that includes screening for chronic disease and risk factors (e.g., mental health issues, stress, blood pressure, diabetes, substance abuse, mammography, colorectal cancer, cholesterol).
Opportunities for education, treatment and follow-up based on results.
Disease Management Education and Counseling
Individual or group disease management education, such as diabetes or asthma education.
Evidence-based community chronic disease self-management and healthy aging programs, such as Living Well with Chronic Conditions, *Tomando Control de su Salud*, Weight Watchers, Arthritis Foundation Exercise Program, Walk with Ease, Breathe Well Live Well, Tai Chi: Moving for Better Balance, Better Bones and Balance, EnhanceFitness and a tobacco cessation program.
Evidence-based behavioral modification, education and counseling/coaching for healthy lifestyles.
Supplies for Chronic Disease Self-Management
Strips and monitors for people with diabetes to test their blood glucose levels, and syringes for insulin injection.
Blood pressure monitoring equipment.
Nicotine replacement therapy (patches, gum, inhalers, etc.).

Benefits Structure and Operational Considerations
Provide a clean, private space where employees can self-test and manage chronic conditions.
Offer education and counseling in different formats, including individual, group, online, by telephone and at the worksite.
Allow the use of sick and/or flex time for employees to get recommended screenings and manage chronic conditions.
Make your campus tobacco free.
Increase availability of healthful food and beverages at the worksite.
Promote physical activity opportunities at the workplace.
Assure a safe indoor environment for employees living with asthma and other respiratory diseases through an indoor air quality policy.
Promote benefits in multiple ways that could include break room signage, e-mail, social media, paycheck stuffers, and reminders on employee intranet, new employee orientation and during open enrollment.
Offer incentives for participation in chronic disease risk assessment, screening and management activities.
Provide health insurance coverage that covers U.S. Preventive Services Task Force A and B recommended services with no cost-sharing (co-pays and deductibles).
Co-payments and deductibles for self-management opportunities should not exceed usual co-payments for other routine medical services and may be waived.

Benefits Resources

Standard model benefits for chronic diseases:
http://www.businessgrouphealth.org/benefitstopics/topics/purchasers/part2.pdf

Evidence-based recommendations for preventive services:
http://www.thecommunityguide.org/about/guide.html

U.S. Preventive Services Task Force:
http://www.uspreventiveservicestaskforce.org/index.html

Appendix B

Living Well with Chronic Conditions Impact Report:
http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Documents/Living%20Well%20Program%20Impact%20Report%20Final.pdf

Disease-specific benefits design information:

- Diabetes: http://diabetesatwork.org/NextSteps/BenefitsDesign.cfm
- Heart disease/stroke: http://www.cdc.gov/dhdsp/pubs/docs/toolkit_guide.pdf
- Asthma: http://www.asthmaregionalcouncil.org/uploads/documents/hria_asthma_report.pdf
- Cancer: http://www.dietandcancerreport.org/pr/ (pages 137-138)

Business Group on Health: *Moving Science Into Coverage: An Employer's Guide to Clinical Preventive Services*: http://www.businessgrouphealth.org/preventive

Robert Wood Johnson Foundation Commission to Build a Healthier America: *Work Matters for Health*: http://www.commissiononhealth.org/PDF/0e8ca13d-6fb8-451d-bac8-7d15343aacff/Issue Brief 4 Dec 08 - Work and Health.pdf (example p. 12: Wal-Mart).

Potential Organizational Partners for Financial Sustainability

Establishing organizational partnerships for sharing resources and costs related to Living Well programs is a crucial means to provide for their financial sustainability. The ideal situation is to embed Living Well as an ongoing line item in these partners' budgets, but these organizations could also be sources of annual funding and support. Some of the most promising types of partners are described in the following sections:

1. Hospitals
2. Health insurers/health plans (commercial, Medicaid and Medicare Advantage)
3. Employers
4. Other sources: aging services providers and participant fees

Please note: Because many organizations that fall into the categories above may cover large areas of the state, it is important for Living Well program delivery partners to coordinate their approach. The Oregon Living Well Network Financial Sustainability Workgroup is an excellent venue to discuss strategies for approaching organizations with regional or statewide reach about potential partnership to financially support self-management programs. The benefits of engaging with the workgroup include the ability to share the experience and perspective of other group members (some of whom are "industry insiders") and to coordinate efforts. Workgroup agendas, minutes and contact information are online at: http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Pages/network.aspx

PARTNERSHIPS CASE STUDY – CENTRAL OREGON

A large health system in Bend supported Living Well for several years through its Community Health Education department. When restructuring threatened to eliminate the program, the Deschutes County Health Department applied for and was awarded a grant that funded a part-time coordinator. HealthMatters Central Oregon (HMCO), a nonprofit health collaborative, which was subsequently established to address high uninsurance rates and poor health outcomes in the region, prioritized chronic disease self-management as one of its four key initiatives. HMCO now funds leader stipends, workshop marketing and snacks, and provides administrative support for the program. Living Well is integrated into HMCO's SharedCare benefits program; members with a chronic condition must participate to maintain eligibility for low-cost medical coverage.

Hospitals as Financial Sustainability Partners

Background:
Hospitals strongly influence the health of Oregon's communities. While common hospital functions include inpatient services such as surgery, emergency care and intensive care, many hospitals also provide outpatient (non-overnight) diagnostic and treatment services for a variety of chronic conditions such as diabetes, cardiovascular disease and lung disease.

Why hospitals would want to support Living Well:

1. ***Medicare penalty for readmissions:*** In 2012, the federal Medicare program will begin to penalize hospitals that show higher-than-expected readmission rates.[1] This provides hospitals a strong reason to make sure that patients leave with the information and support they need, and a referral to Living Well can be a key component of patients' discharge plans. Hospital discharge planners and care coordinators will be increasingly important partners for Living Well program as the new Medicare rules are implemented.

2. ***Community wellness:*** Hospitals are major contributors to the wellness of people in their service areas through delivery of outpatient health education and community wellness services and programs. Often this is a key component of a hospital's marketing and positioning strategy. Presenting Living Well programs as a means to demonstrate community leadership is a promising strategy for approaching hospitals as financial sustainability partners.

3. ***Control costs:*** As providers of key medical services, hospitals have a financial incentive to support programs like Living Well that can help patients stay healthy after they are discharged. The cost of hospital readmissions is skyrocketing; according to a recent study, nearly one in five fee-for-service Medicare patients discharged from the hospital is readmitted within 30 days, and one in three is readmitted within 90 days. These readmissions cost Medicare $18 billion in 2007, and readmission rates are increasing.[2] If insurance does not cover the services or patients themselves cannot afford them, the hospital will not receive payment.

4. ***Show the value of community benefits:*** Nonprofit hospitals have an added incentive to support self-management programs through community benefits. In order to maintain their nonprofit status, hospitals are required to report the value of their community benefits programming—which can include offerings such as Living Well—to both the IRS and the

[1] Institute for Healthcare Improvement Weekly Update, February 28, 2011.
[2] Jencks SF, Williams MV, Coleman AE. *New England Journal of Medicine* 2009; 360:1418-1428.

state. Living Well could fit several categories of offerings that qualify, including health promotion and wellness programs, lectures and workshops provided by staff members to community groups, and worksite health education programs.[1] New federal legislation will also require nonprofit hospitals to perform periodic community health needs assessments in the future, and this process may provide opportunities for Living Well advocates to provide input on the importance of hospitals supporting self-management programs. Community benefits offices and hospital-associated charitable foundations would be the first lines of contact for this strategy.

How they can be a funding resource:

- Hospitals can help support delivery of programs in local communities by sponsoring workshops, assisting with workshop coordination, hosting leader training, referring patients, recruiting hospital volunteers to provide workshops, and helping to publicize programs.
- Hospitals may also consider making Living Well a standard part of health education offerings, available both to discharged patients and the general public. They can provide space and healthy snacks for classes, and consider underwriting scholarships for people with financial need.
- Hospitals should be encouraged to make Living Well a routine offering for patients and a standard benefit for hospital employees. (Hospitals are often major employers in the areas they serve, and have a strong stake in keeping their employees healthy. Please see the employer/worksite section below for tips on working with hospitals from this aspect.)

Examples:

Several hospital systems in Oregon support self-management program delivery, including the following:

- The Veterans Affairs Medical Centers in Portland and White City provide in-hospital and outpatient programs to patients and their families. They have trained VA staff members and volunteers to deliver Living Well workshops. The Portland facility supports staff members at six outpatient clinics to organize and deliver the program both at their clinics and in collaboration with community agencies.
- Tuality Healthcare in Hillsboro supports a part-time coordinator who is working on systems to connect patients to Living Well and *Tomando Control* programs, help reduce uncompensated hospital readmissions, and connect Latino patients to programs through their *¡Salud!* community health program.

[1] Community Benefit Reporting Categories, Office for Oregon Health Policy and Research, July 2008; http://www.oregon.gov/OHPPR/RSCH/docs/Community_Benefits/CBR2_July_2008.pdf?ga=t.

- Samaritan Health Services Inc. (SHS) is comprised of five hospitals, 70 primary care and specialty physician clinics, senior care facilities and four insurance plans providing health care services from the Oregon Coast to the mid-Willamette Valley, including Benton, Lincoln and Linn counties. SHS has demonstrated its commitment to building healthier communities together by employing a full-time Living Well with Chronic Conditions coordinator, hosting Living Well workshops and promoting the Living Well program. Workshop attendees are often referred by SHS physician offices, case managers, diabetes educators, nurses and medical assistants.

Who to talk to and how to get in the door:

If you're already working with your hospital, ask your contact who might be the best person for a conversation about broader involvement and possible funding and request an introduction. In larger hospitals, the managers of disease-specific programs such as diabetes clinics and cardiac or pulmonary rehabilitation could be helpful contacts. In smaller hospitals, these functions may be grouped together into a single health education unit. Discharge planners and employee wellness coordinators could also be good contacts. Within hospital administration, supporters may be found in the marketing department, community benefits office, volunteer office, chaplain's office or charitable foundation.

Appendix C (2)

Issue Brief: Living Well and Hospitals

Chronic disease is putting our health care system under enormous pressure. Nationally, 80 percent of older adults have at least one chronic condition, and 50 percent have at least two.[1] In Oregon each year, diseases such as cancer, heart disease, lung disease, diabetes and arthritis claim the lives of 19,219 people and result in $1.4 billion in hospitalization costs.[2]

Although patients with chronic conditions may know *what* they need to do to manage their disease, they often don't know *how*. It is critical to help Oregonians with existing chronic conditions live successfully and help them use the health care system as efficiently as possible.

The Living Well with Chronic Conditions Program

Oregonians are learning how to manage their chronic health conditions by participating in the **Living Well with Chronic Conditions** program and its Spanish language/cultural version, *Tomando Control de su Salud*. Living Well is delivered in a series of six weekly 2-1/2 hour workshops led by trained community members, many of whom have chronic conditions themselves.

Living Well is a proven program developed at Stanford University. The workshops teach people with chronic diseases to make healthy lifestyle choices and lessen the impact of their symptoms and of the disease itself. Participants have less pain and more energy. They are more able to live the lives they want, and gain the ability and confidence to care for their conditions. Participants learn how to properly use medications, communicate effectively with health care providers, and evaluate new treatments.

Living Well improves quality of life by reducing fatigue and increasing physical activity, emotional and physical well-being, and ability to function in social settings. After completing Living Well workshops, patients are healthier and better equipped to avoid unnecessary hospital readmissions.

Living Well and Hospitals

The average cost for someone to attend the six-week program is $375—compare this to the thousands of dollars a hospital could spend on one unreimbursed avoidable readmission. Although hospitals may use different means of calculating their exact savings, the return on investment in the program is clearly significant.

As the number of Oregonians living with chronic conditions continues to grow, Living Well can help hospitals respond by teaching participants how to set goals and make their own plans to manage their disease and improve their health, enhance their ability to stay independent, and increase their energy and self-confidence. The program also helps patients learn how to improve

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[1] National Institute on Aging, http://www.nia.nih.gov/HealthInformation/Publications/ClinicianHB/06_chronic.htm
[2] Oregon Department of Human Services. *Keeping Oregonians Healthy*, 2007. http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/Documents/healthor.pdf

communication with their health care providers and caregivers, which is important during the crucial transition from hospital to home.

Hospitals can help make it possible for individuals to live successfully with chronic conditions to increase the efficiency of our health care system by:

- Supporting delivery of Living Well programs in local communities by sponsoring workshops, assisting with workshop coordination, hosting leader training, referring patients, recruiting hospital volunteers to provide workshops, and helping to publicize programs.
- Making Living Well a standard part of your hospital's health education offerings, available both to patients and the general public. Provide space and healthy snacks for workshops, and consider underwriting scholarships for people with financial need.

Appendix C (2)

Talking Points for Hospitals

These talking points are for use by Living Well programs when approaching funders. They are not to be handed out. Instead, leave the "issue brief" handout. Please remember, when you use these talking points, be sure to listen as much as you talk. The goal is to understand your prospect's perception of the program, and what they would need to support it.

- Acknowledgment:
  - Thank the prospect for any current or prior engagement in or support/funding for the Living Well program, and for the opportunity to talk now.
- The problem:
  - Nationally, 80 percent of older adults have at least one chronic condition, and 50 percent have at least two.[1] Every year, the toll of chronic disease in Oregon is more than 19,000 lives and $16 billion in health care costs.[2]

  - Chronic diseases affect a hospital's bottom line as an employer, because they are one of the leading causes of missed days of work. Every day in America, 40,000 people miss school or work due to asthma.[3] Chronic diseases account for more 2.5 billion missed work days or "work cutback" days per year.[4]

  - Chronic diseases are expensive to health purchasers. Nationally, the 27 percent of people with multiple chronic conditions account for two-thirds of health care spending.[5]

- The solution:
  - Patients who are supported beyond discharge and taught to self-manage their conditions are better equipped to avoid an unnecessary readmission or unreimbursed emergency room visit.
  - Living Well with Chronic Conditions is a six-week workshop that provides tools for living a healthy life with chronic health conditions, including diabetes, arthritis, asthma and heart disease.
  - Living Well workshops teach people with chronic diseases to make healthy lifestyle choices and, in many cases, lessen the impact of their symptoms or of the disease itself. Participants learn to deal with issues such as fatigue, frustration, pain and

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[1] http://www.cdc.gov/chronicdisease/resources/publications/AAG/aging.htm
[2] Oregon Department of Human Services. *Keeping Oregonians Healthy*, 2007. http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/Documents/healthor.pdf
[3] Asthma and Allergy Foundation of America: http://www.aafa.org/display.cfm?id=9&sub=42
[4] Kessler, RC et al. The Effects of Chronic Medical Conditions on Work Loss and Work Cutback **.** *Journal of Occupational & Environmental Medicine*. 43(3):218-225, March 2001.
[5] US Department of Health and Human Services. Multiple Chronic Conditions—A Strategic Framework, 2010. http://www.hhs.gov/ash/initiatives/mcc/mcc_framework.pdf

isolation. They learn exercises that help maintain strength and flexibility. They learn information on properly using medications, communicating with health care providers, and evaluating new treatments.
    - Dozens of organizations offer Living Well workshops around the state, and about 4,000 Oregonians have participated in the program so far. Workshops are available in 27 counties, and an online version is being piloted.
- The impact:
    - Living Well improves the quality of life of participants by helping reduce fatigue and increase their physical activity, emotional and physical well-being, ability to function in social settings, and communication with their doctors, according to research conducted by Stanford University and replicated in several other studies.
- Why it matters to **hospitals**:
    - The average cost for someone to attend the six-week program is $375—compare this to the thousands of dollars a hospital could spend on an unreimbursed avoidable readmission or unpaid emergency room visit. Although hospitals may use different means of calculating their exact savings, the return on investment in the program is clearly significant.
    - The program also helps patients learn how to improve communication with their health care providers and caregivers, which eases patient care both during a hospital stay and care-setting transitions.
    - As the number of Oregonians living with chronic conditions continues to grow, Living Well can help hospitals respond. It teaches participants how to set goals and make their own plans to manage their disease and improve their health, enhancing their ability to stay independent and increasing energy and self-confidence.
- What hospitals can do:
    - Help support delivery of programs in local communities by sponsoring workshops, assisting with workshop coordination, hosting leader training, referring patients, recruiting hospital volunteers to provide workshops, and helping to publicize programs.
    - Consider making Living Well a standard part of your hospital's health education offerings, available both to patients and the general public. Provide space and healthy snacks for classes, and consider underwriting scholarships for people with financial need.
    - Make Living Well a routine offering for patients and a standard benefit for hospital employees.

Employers as Financial Sustainability Partners

Background:
The bottom line of a business can be deeply affected by its employees' health and productivity, which makes employers potential partners in establishing financial sustainability for self-management programs. Large businesses—particularly those that are self-insured—and businesses that provide ample health benefits are the most promising choices for financial sustainability partnerships, because these employers will have a stake in reducing health care costs and will likely have more resources for addressing health-related issues among employees.

Why Employers Would Want to Support Living Well:
Chronic diseases are one of the leading causes of missed days of work and lack of productivity at work. As an increasing number of employees have chronic conditions, helping them manage these conditions becomes vital. Employees who have the knowledge and skills to make healthy choices will be more successful in managing their chronic health conditions. They will be less likely to go to the hospital or emergency room, and may be less likely to be readmitted after leaving the hospital.

Employers care about the health and productivity of their employees. Living Well can help to reduce health care costs, decrease absenteeism, lower the number of worker's compensation claims, and retain healthy employees.

How Employers Can Be a Funding Resource:
Some local programs already work with area employers that provide in-kind assistance in the form of marketing programs to employees, donating space or healthy snacks for attendees, or by providing financial sponsorship for workshops. That provides an excellent entrée for a conversation about how they can provide more sustainable, impactful support.

If an employer offers insurance benefits and is convinced of the importance of self-management programs to improve employee health and productivity or decrease health insurance premiums, they may be convinced to advocate for adding programs as standard covered benefits through their insurance and employee assistance program contracts. See the model benefits package in Appendix B for details.

If an employer does not offer insurance benefits, Living Well programs could provide an inexpensive means to support employees with chronic conditions in staying healthy and reducing their need for expensive emergency and hospital services.

Oregon State Chamber of Commerce Searchable Business Directory:
http://oregonorcoc.weblinkconnect.com/search

Example:

- The Deschutes County Employee Benefit Advisory Council approved the Living Well program as a benefit for employees and dependents in 2007. Employees register for community-based workshops and pay a $10 registration fee. If they attend four of the six sessions, the Living Well regional coordinator sends a verification of attendance letter to the benefits coordinator. The employee is then reimbursed for the $10 fee through the Self Insurance Benefit Fund, and Living Well Central Oregon receives $50.

Who to Talk to and How to Get in the Door:

Approach business leaders who are already involved in local business health coalitions, who sit on health-related boards, or whose companies support local health events. Local chapters of Rotary, Lions or Kiwanis clubs, chambers of commerce, Small Business Association groups, and meetings of health or business coalitions are good places to make connections.[1] Be mindful that time is money (start with a 15-minute appointment if necessary), ask lots of questions (e.g., current employee health benefits, types of claims, employee demographics) to determine the potential value of Living Well to the employer. Let employers tell you what they need.

When preparing to approach employers, research the company and look for potential areas of connection. For example, an employer of sedentary office workers may see the benefit Living Well offers in improving physical activity or helping employees to eat more healthfully, while a company whose employees exert themselves physically all day at work could have a stronger need for enhancing employees' stress management and relaxation skills.

> *Business leaders are important champions because of their influence, credibility, connections and resources… They can help [by] establishing a model worksite program at their company [and] talking to other business leaders about the benefits…[such as] reducing company health care costs, improving employee health and productivity, and supporting healthy communities.*
>
> —CDC Heart Healthy and Stroke Free Worksites Toolkit Guide

Larger employers may have a wellness coordinator who could be a helpful ally. If the company offers health benefits, they may have conducted employee health risk assessments to pinpoint employees' health issues. If this type of workplace-specific information is not available, specific information about the local population such as county-specific data on the number of Oregonians with chronic diseases in the state publication *Keeping Oregonians Healthy*[2], the Living Well county level data reports[3] and the Robert Wood Johnson Foundation's County Health Rankings[4] may be helpful substitutes.

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[1] U.S. Centers for Disease Control and Prevention. *Successful Business Strategies to Prevent Heart Disease and Stroke: Heart Healthy and Stroke Free Worksites Toolkit Guide.* http://www.cdc.gov/dhdsp/pubs/docs/toolkit_guide.pdf
[2] http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/Documents/healthor.pdf
[3] http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Pages/pubs.aspx
[4] http://www.countyhealthrankings.org/

Appendix C (3)

Issue Brief: Living Well and Employers

Chronic disease is putting our health care system under enormous pressure, and purchasers are bearing much of the cost. In Oregon, diseases such as cancer, heart disease, lung disease, diabetes and arthritis claim the lives of more than 19,000 people and result in $1.4 billion in hospitalization costs each year.[5] Chronic diseases also account for more than 2.5 billion missed work days or "work cutback" days per year in the United States.[6]

Although employees with chronic conditions may know *what* they need to do to manage their disease, they often don't know *how*. It is crucial to help Oregonians with existing chronic conditions live successfully and help them use the health care system as efficiently as possible.

The Living Well with Chronic Conditions Program
Oregonians are learning how to manage their chronic health conditions by participating in the **Living Well with Chronic Conditions** program and its Spanish language/cultural version, *Tomando Control de su Salud*. Living Well is delivered in a series of six weekly 2-1/2 hour workshops led by trained community members, many of whom have chronic conditions themselves.

Living Well is a proven program developed at Stanford University. The workshops teach people with chronic diseases to make healthy lifestyle choices and lessen the impact of their symptoms and of the disease itself. Participants have less pain and more energy. They are more able to live the lives they want, and gain the ability and confidence to care for their condition. Participants learn how to properly use medications, communicate effectively with health care providers, and evaluate new treatments.

Living Well improves quality of life by reducing fatigue and increasing physical activity, emotional and physical well-being and ability to function in social settings. After completing Living Well workshops, patients are healthier and better equipped to avoid unnecessary hospital readmissions.

Living Well and Employers
Living Well can help employers build a healthier, more successful, and more productive workforce. As the number of Oregonians living with chronic conditions continues to grow, Living Well can help valuable employees stay healthy and stay at work.

The average cost for someone to attend the six-week program is $375. Compare this to the cost of missed workdays and increased health care costs due to avoidable emergency room visits and hospitalizations.

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[5]Oregon Department of Human Services. *Keeping Oregonians Healthy*, 2007. http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/Documents/healthor.pdf
[6]Kessler, RC et al. The Effects of Chronic Medical Conditions on Work Loss and Work Cutback. *Journal of Occupational & Environmental Medicine*. 43(3):218-225, March 2001.

Appendix C (3)

Employers can help make it possible for individuals with chronic conditions to live successfully, for communities to embrace health and disease prevention, and to reduce the demand on our health care system.

- If you offer insurance benefits:
    - Make Living Well a standard part of your employee benefit program and encourage employees to use it.
    - Ask your health plan and employee assistance programs to include Living Well workshops as a covered benefit.
- Publicize Living Well programs to your employees, and consider providing incentives for participation.
- Host Living Well workshops at your worksite.
- Have administrative policies that support employees who want to attend Living Well workshops, such as flex time or sick leave.
- Encourage Living Well for family members of employees, and support employees in attending with family members.
- Support employees who want to be trained as Living Well leaders, through flexible work arrangements or other arrangements support.

Appendix C (3)

Talking Points for Employers Who Offer Insurance

These talking points are for use by Living Well programs when approaching funders. They are not to be handed out. Instead, leave behind the "issue brief" handout. Please remember, when you use these talking points, be sure to listen as much as you talk. The goal is to understand your prospect's perception of the program, and what they would need to support it.

- Acknowledgment:
  - Thank them for any current or prior engagement in or support/funding for the Living Well program, and for the opportunity to talk with them now.
- The problem:
  - Chronic diseases are a major cause of missed work days. For example, every day in America, 40,000 people miss school or work due to asthma.[7] Chronic diseases account for more 2.5 billion missed work days or "work cutback" days per year in the U.S.[8]
  - The 27 percent of Americans with multiple chronic conditions account for two-thirds of health care spending.[9]
  - Every year, the toll of chronic disease in Oregon is more than 19,000 lives and $16 billion in health care costs.[10]
- The solution:
  - Worksite wellness programs and policies contain health care costs, decrease absenteeism, improve employee morale, cut the number and cost of workers' compensation claims, and help attract and retain healthy employees, according to dozens of studies.
  - Providing coverage for Living Well for members is a cost-effective complement to employer wellness programs and disease management.
  - Employees who have the knowledge and skills to make healthy choices will be more successful in managing their chronic health conditions. They will be less likely miss work and may be less likely to file worker's compensation claims.
- Living Well:
  - Living Well with Chronic Conditions does just that. It is a six-week workshop that provides tools for living a healthy life with chronic health conditions, including diabetes, arthritis, asthma and heart disease.
  - Living Well workshops teach people with chronic diseases to take the best care possible and, in many cases, lessen the impact of their symptoms or of the disease

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[7]Asthma and Allergy Foundation of America: http://www.aafa.org/display.cfm?id=9&sub=42

[8]Kessler, RC et al. The Effects of Chronic Medical Conditions on Work Loss and Work Cutback. *Journal of Occupational & Environmental Medicine*. 43(3):218-225, March 2001.

[9]US Department of Health and Human Services. Multiple Chronic Conditions—A Strategic Framework, 2010. http://www.hhs.gov/ash/initiatives/mcc/mcc_framework.pdf

[10]Oregon Department of Human Services. *Keeping Oregonians Healthy*, 2007. http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/Documents/healthor.pdf

itself. They learn to deal with physical and emotional issues, gain tips on properly using medications and communicating with health care providers, and form relationships that create a support system across the community.

- The impact:
  - An Oregon State University study of 4,000 program participants in Oregon found that they avoided more than 500 emergency department visits, more than 500 hospitalizations and nearly 3,000 hospital days, yielding an estimated health care savings of more than $6.5 million.
  - After completing Living Well workshops, patients are healthier and less likely to be readmitted to hospitals, ultimately reducing health care and disability costs and helping them stay at work.
  - Because Living Well improves participants' self-confidence for managing their health problems, it helps shift a portion of the health care burden off health care purchasers and insurers while empowering and activating participants.
- Why it matters to **employers**:
  - Living Well can help employers build a healthier, more successful and more productive workforce.
  - The average cost for someone to attend the six-week program is $375. Compare this to thousands of dollars for a hospital stay. Lower medical costs can translate to lower insurance premiums.
- What employers can do:
  - If you offer insurance benefits:
    - Make Living Well a standard part of your employee benefit program and encourage employees to use it.
    - Ask your health plan and employee assistance programs to include Living Well workshops as a covered benefit.
  - Publicize Living Well programs to your employees, and consider providing incentives for participation.
  - Host Living Well workshops at your worksite.
  - Have administrative policies that support employees who want to attend Living Well workshops, such as flex time or sick leave.
  - Encourage Living Well for family members of employees, and support employees in attending with family members.
  - Support employees who want to be trained as Living Well leaders, through flexible work arrangements or other arrangements support.

Insurers as Financial Sustainability Partners

Health Insurers and Health Plans

Organizations that provide health care coverage may be funded by public dollars (Medicaid and Medicare, for example) or by payments from private entities (e.g., employers or unions that purchase coverage for groups, or people purchasing individual health coverage). Insurance is an enormously complex topic, so the discussion here will cover only a few general categories of organizations that have successfully partnered with members of the Oregon Living Well Network and contributed to the financial sustainability of programs.

Commercial Health Insurance Plans

Background:
Commercial health insurance plans are organizations that contract with individuals or entities like employers or unions to cover expenses for a set array of medical services for members younger than 65. Because they accept the risk associated with providing medical services to large groups of people, commercial plans are interested in reducing the likelihood of expensive events occurring and keeping the populations they provide coverage for as healthy as possible.

Some commercial plans are set up as health maintenance organizations (HMOs), which contract with a specific network of providers and generally only cover services from within the network unless specific pre-authorization is granted. Others serve as preferred provider organizations (PPOs), which cover a higher proportion of the cost of services from providers and facilities on a "preferred" list.

Why Commercial Insurers Would Want to Support Living Well:
Commercial health plans are under financial pressure; the cost of providing services is increasing, and there is a limit to how far premiums may be raised. Although many health plans based in Oregon are nonprofit companies, they are still competitive businesses that are concerned with providing a quality service for a reasonable price.

Living Well helps insurers control costs by shifting a portion of the health care burden off the delivery system while empowering and activating members. As the number of Oregonians living with chronic conditions continues to grow, Living Well can help

Resource for Identifying Health Insurance Prospects
Searchable national insurance database:
http://finder.healthcare.gov/

members learn how to improve communication with their health care providers and caregivers and use the health system appropriately. Living Well is also a valued benefit that can set a business apart.

Insurers are interested in the value of a service; highly valuable services will have a low cost, be very effective, and have ample evidence to back their use. When deciding whether or not to cover a program like Living Well, health plans will need information about the program that will help them weigh the cost against the potential benefit to members and purchasers. See the Living Well Impact Report[1] for cost/benefit analysis and return on investment information.

How Commercial Plans Can Be a Funding Resource:
Commercial plans can support Living Well programs by directly providing programs to members through disease management services, and covering workshops as a primary benefit. They may also provide financial resources in the form of grants or in-kind support, through donation of space for classes, healthy snacks, marketing and advertising services, or personnel to serve as local or regional program coordinators. They can also actively encourage members and employees to participate in Living Well.

Physician groups can also be financial sustainability partners for Living Well programs. Providence Medical Group, a network of more than 90 primary and specialty care clinics, has begun providing free Living Well workshops to patients throughout the Portland Metro area, with a goal of at least four workshop series per year. A Providence Innovation Grant, which supports new ideas for delivering connected care, funds workshop supplies as well as coordinator and volunteer facilitator stipends. Providence Medical Group will continue to support these workshops throughout grant funds, with the goal of finding permanent funding through the medical group.

Examples:

- PacificSource Health Plans, a nonprofit community health plan based in Springfield, reimburses members up to $25 for Living Well workshop fees and promotes workshops through their website. PacificSource also supports the United Way's 100% Access Coalition by underwriting a full-time medical access program nurse, who connects low-income, uninsured people with primary care services and makes referrals to Living Well workshops offered through PeaceHealth Gerontology Institute.

- Group Health, an integrated health care delivery and financing system based in Seattle, reached close to 900 members in 2010 through in-person Living Well workshops and the online Better Choices, Better Health program. Group Health funds the equivalent of two full-time positions within its health information and promotion department that support Living Well. This includes a part-time volunteer supervisor who recruits, trains and supports peer leaders and other staff who coordinate programs and market workshops. Group Health provides stipends to volunteer leaders. Group Health members typically fill

[1] http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Documents/Living Well Program Impact Report Final.pdf

the workshops, so they only open programs to community members as space permits. Staff send invitation letters to patients with specific chronic conditions who have visited a provider within the past three months. Physician and nurse referrals also help to fill workshops.

Who to Talk to and How to Get in the Door:
Most commercial insurance companies have disease management sections that provide specific education and coaching to members with specific chronic conditions, and they may be receptive to a discussion about adding programs as a referral option. Larger plans may also offer wellness activities and have an in-house employee wellness coordinator. Inviting one or more of these coordinators to attend a workshop or information session could get a conversation about Living Well started. The medical director would be another important contact. Depending upon the organization, the utilization management supervisor or the operations manager may be a key decision-maker regarding financial commitments. Use the results of the prospect generator (section 3.2.b) to identify possible connections to people in these or equivalent positions in the organization of interest. If possible, be prepared to share personal success stories of actual plan members (see section 3.2.f for pointers).

Medicaid Managed Care Organizations (MCOs)

Background:
Medicaid—known in Oregon as the Oregon Health Plan (OHP)—is a health plan jointly paid for by federal and Oregon general fund dollars, and administered through the Oregon Health Authority's Division of Medical Assistance Programs (DMAP). To qualify for OHP coverage, a person must meet specific income criteria; pregnant women, children, families receiving TANF (cash assistance) benefits, people older than 65 who are blind or disabled, and foster and adoptive children are included under OHP Plus by federal requirements. OHP Standard extends coverage to an additional group of otherwise uninsured, low-income adults.[2]

The Oregon Health Plan is complex, and to partner effectively with its component organizations, it is important to have a basic understanding of terminology and how the system works. OHP emphasizes managed care, a system that coordinates services through one or a network of primary care providers or clinics. The primary care provider makes referrals to specialty providers when necessary, who are paid by the providing managed care organization.[3]

The majority (80 percent) of OHP members are enrolled in a fully capitated health care plan (FCHP), a type of managed care organization (MCO) that manages members' physical health and is paid on a per member, per month basis (capitation). OHP MCOs include dental care organizations

[2]Oregon Health Authority, Office of Health Policy and Research. "Medicaid in Oregon: Defining the Population." Presentation to Health System Transformation Team, February 16, 2011. http://www.oregon.gov/OHA/docs/hlth-sys-trans/2011/2011-0216-pk.pdf
[3]DMAP Worker Guide. Oregon Health Authority, Division of Medical Assistance Programs, February 2011.

(DCOs—not discussed here) and mental health organizations (MHOs—see section below for details).

Why Medicaid Managed Care Organizations Would Want to Support Living Well:
Because the MCOs that cover OHP members are paid by capitation rather than directly based on the volume of services members may use, MCOs have a built-in incentive to help members stay healthy and use health services as judiciously as possible. MCOs are required to provide disease prevention services to members, and have programs to assist OHP members with the management of specific conditions like diabetes, asthma and heart disease. The plans also provide intensive case management services to those OHP members with exceptional or complex care needs. The actual services provided vary from plan to plan. Some MCOs incorporate Living Well programs into their disease prevention services (see examples below). Others may be encouraged to do so by Living Well delivery partners in the MCO's service area (see sidebar for a list of MCOs by county).

Federally Qualified Health Centers, including community, migrant and homeless health centers, provide comprehensive primary care regardless of a person's ability to pay, along with supportive services that promote access to care. Several Oregon FQHCs currently provide self-management programs to patients. They will become increasingly important financial sustainability partners for Living Well workshops as billing is established for self-management programs through the Oregon Health Plan.

How MCOs Can Be a Funding Resource:
Oregon policymakers recently discussed the possibility of extending OHP coverage to include chronic disease self-management programs as a billable service for members with selected covered health conditions. However, under current federal Medicaid payment requirements related to certain provider types and community clinics (Federally Qualified Health Centers—see the sidebar and the Medicaid Reimbursement Update information sheet in the appendix section for details), inclusion of Living Well is not feasible at this time. It is hoped that the eventual addition of this benefit will allow some Living Well leaders to bill DMAP or managed care plans for providing programs to members with qualifying diagnoses. The availability of this funding source would have positive implications for financial sustainability of self-management programs, and would increase the likelihood of successful partnerships with OHP managed care plans, DMAP and Federally Qualified Health Centers (see sidebars) for delivering programs to members.

In the meantime, MCOs should be encouraged to support Living Well programs as part of their disease prevention activities. They may also be interested in providing self-management programs to their members who are simultaneously eligible for both Medicaid (OHP) and Medicare (the federally administered health insurance program for people 65 and older). These "dual eligibles" include very low-income seniors and younger people with disabilities; although they make up only 14 percent of the Medicaid population, they account for 27 percent of Medicaid spending in

Oregon.[4] Many dually eligible OHP members may face substantial barriers to attending programs like Living Well due to the significant health challenges they often face. However, managed care plans are highly motivated to assist them in successfully managing their chronic conditions. These members are potentially high-priority candidates for attending self-management workshops, and working with an MCO to find ways to provide dually eligible clients with access to programs could help to forge a new partnership.

Examples:

- MVP Health Authority (formerly Mid-Valley IPA) provides medical benefits to OHP members and people dually eligible for both Medicare and Medicaid in Marion, Polk and Yamhill counties. Since 2008, MVP Health Authority has supported Living Well (known locally as "Living Healthy") as both a wellness program and as a chronic disease management effort, and recently added Living Healthy with Diabetes (the Stanford Diabetes Self-Management Program). Living Healthy is an integral part of the organization's quality improvement program, integrated care team (ICT), and model of care. Programs are funded by administrative dollars with the full anticipation that these services will be billable to the plan's medical benefits in the future.

- OHP members who are not enrolled in managed care are known as "open card" or "fee-for-service" (FFS) members. They have access to care coordination and 24-hour, seven-day-a-week nurse triage and advice services, and some are also eligible for disease or medical case management based on risk. These services are provided through the Oregon Health Plan Care Coordination Program, a supplemental OHP benefit provided by APS Healthcare. By accessing the statewide online program listings, APS refers OHP members to workshops through its website, health coaches and nurse advice line services.

Who to Talk to and How to Get in the Door:
As of the publishing of this document, many MCOs support delivery of Living Well workshops, and the degree of financial assistance they provide varies. Some administer the program using internal staff and offer workshops directly to members, while others refer members to community-based programs and reimburse them for out-of-pocket participation fees.

Managed care organizations need an easy way to connect members to workshops, quantify costs and savings, and track how participation in Living Well improves their quality of life and

OHP Managed Care Organizations by County:
http://www.oregon.gov/DHS/healthplan/managed-care/plans.shtml

MCO Contacts:
http://www.oregon.gov/OHA/healthplan/managed-care/main.shtml

[4] Oregon Health Authority, Office of Health Policy and Research. "Medicaid in Oregon: Defining the Population." Presentation to Health System Transformation Team, February 16, 2011. http://www.oregon.gov/OHA/docs/hlth-sys-trans/2011/2011-0216-pk.pdf

medical outcomes. Quality improvement and disease management departments are good places to start a conversation with your local MCO. For a list of contacts, see http://www.oregon.gov/DHS/healthplan/managed-care/plans.shtml.

Medicaid Mental Health Organizations (MHOs)

Background:
Although efforts are underway to integrate the delivery of mental (behavioral) and physical health services through OHP under local or regional coordinated care organizations, these services are provided through separate organizations. Mental health services are provided to the majority (93 percent) of the OHP population through mental health managed care organizations. Known as MHOs, they provide diagnosis and treatment of mental health conditions and alcohol and drug addiction. Like physical health managed care plans, MHOs have a financial incentive to help their members stay well and use their benefits appropriately.

More Information About Medicaid Mental Health Organizations:

Oregon Medicaid MHO List
(including regions served):
http://www.oregon.gov/DHS/mentalhealth/mho/mho-list.shtml

MHO Contacts
http://www.oregon.gov/DHS/mentalhealth/mho/contractor-contacts.pdf

Through OHP mental health and drug/alcohol treatment benefits, Living Well may be delivered by Qualified Mental Health Providers (QMHPs) trained at the master's level, such as licensed clinical social workers or licensed professional counselors, or by qualified mental health associates (QMHAs) such as bachelor's-level trained alcohol and drug rehabilitation counselors. Living Well programs may also be delivered though OHP mental health services by trained peer wellness coaches.

Why MHOs Would Want to Support Living Well:
MHOs are very interested in helping support their members with serious mental illness, who die an average of 25 years younger than the general population, in large part due to chronic physical health conditions such as heart disease.[5]

MHOs are also interested in improving integration between mental and physical health services, and Living Well is a great example of a program that does this. Living Well is also of potential interest to MHOs because it makes use of peer leaders. Reflecting a growing nationwide trend toward delivery of mental health and substance abuse recovery services by trained peers, peer-delivered services (known in the industry as PDS) were added several years ago to the list of services covered under OHP through MHOs. As of this document's publication, several of the 10 MHOs allow billing by peer coaches (see sidebar on the next page for details).

[5] National Association of State Mental Health Program Directors Medical Directors Council. *Measurement of Health Status for People with Serious Mental Illnesses*, 2008.

How MHOs Can Be a Funding Resource:
Like MCOs, MHOs can directly support programs by directly delivering programs to members, or by underwriting programs in the community. MHOs can also reimburse for leaders' time leading programs for OHP members with mental health diagnoses via billing and reimbursement. Professional mental health providers (QMHPs or QMHAs) and/or peer wellness specialists may be able to bill for leading programs for OHP members if the MHO has agreed to cover them.

Creating partnerships with those service delivery agencies associated with MHOs that allow billing by trained peers would be especially helpful in establishing financial sustainability for Living Well programs. Training peer specialists who can bill for delivering self-management programs for OHP members living with mental health conditions would not only increase financial sustainability of programs, but would also increase the number of locally available leaders and help to expand access to workshops by people with mental health and substance use disorders.

Examples:

- **Benton County** is using certified peer mental health specialists acting as paid staff to deliver the Living Well Program. Accountable Behavioral Health Alliance (ABHA), the plan that manages the mental health needs of OHP clients in the county, has set aside a pool of funds to incentivize the counties in its service area to begin claiming peer-delivered services. The workshop must be part of an OHP member's treatment plan, known as an Integrated Service Plan (ISSP).

- **Jackson County Mental Health** (JCMH) provides workshops for mental clients led by therapists, case managers and skills trainers. JCMH tracks OHP members who participate and each encounter counts toward their credit for monthly payment from the state. Participants must be referred, the workshop must be a part of the client's Integrated Service Plan (ISSP) and a billing note must accompany each session. At least one of the leaders must be a master's-level mental health professional (QMHP).

Who to Talk to and How to Get in the Door:
Within the MHO itself, people to start the conversation with about self-management could include the quality improvement manager or exceptional needs coordinators. The CEO and operations manager will likely be key decision-makers about financial commitments to support Living Well.

The concept of Peer-Delivered Services (PDS) is well accepted within the realm of alcohol and drug treatment, so it will be important to emphasize in your communication that Living Well workshops are evidence-based, peer-led programs. Peer advocates working in the mental health and addictions fields are well positioned to see the potential for Living Well programs to empower people in recovery, both as leaders and as program participants. The fact that workshops increase self-efficacy among participants and develop facilitation skills among leaders is likely to resonate among advocates.

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As of the publishing of this document, the following MHOs use Peer-Delivered Services (PDS) in their system of care. For information about the counties each organization serves, see the sidebar on page 6 above.

- Greater Oregon Behavioral Health
- Jackson Behavioral Health
- Lane County (LaneCare)
- Accountable Behavioral Health Alliance
- Washington County Department of Health & Human Services
- Mid-Valley Behavioral Care Network

MHOs use subcontractors to provide most mental health services, including nontraditional approaches like peer coaching. These agencies, which include county mental health agencies and an assortment of freestanding nonprofits, are also potential partners in self-management workshop delivery. Individual MHO websites are a good source of information about their partner organizations.

Medicare Advantage Plans

Background:
Medicare is the federally administered health insurance program for people 65 and older. Medicare part A provides hospital benefits, part B provides medical benefits, and part D provides prescription drug coverage. Part C, also known as Medicare Advantage (MA), is an optional means for Medicare beneficiaries to receive their services through a private health plan. Members typically pay an additional premium to receive benefits not covered under traditional Medicare, such as dental and vision care.

Contact information for Medicare Advantage Plans
http://www.oregon.gov/DCBS/SHIBA/docs/2011_guide.pdf
(see pages 52-119)

Why Medicare Advantage Plans Would Want to Support Living Well:
Like commercial insurers who accept the risk of covering younger people, Medicare Advantage plans are interested in reducing the likelihood of expensive events occurring within their covered population. They have a vested interest in keeping the seniors they provide coverage for as healthy as possible; given that people older than 65 experience high rates of many chronic health conditions,[6] Living Well could be a means to significantly increase the health of their members and reduce expensive events like emergency room visits and hospitalizations, as well as reduce the potential need for long-term care services.

[6]Oregon Department of Human Services. *Keeping Oregonians Healthy*, 2007.
http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/Documents/healthor.pdf

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How Medicare Advantage Plans Can Be a Funding Resource:
Medicare Advantage plans can be financial sustainability partners for self-management programs in ways similar to commercial plans and Medicaid managed care organizations. Please see the sections above for specifics for ways they can be encouraged to support Living Well.

Examples:

- Mid-Rogue Independent Physicians Association (MRIPA) serves in Jackson, Josephine and parts of Douglas counties and offers Care Source (a Medicare Advantage product) as well as serving as an OHP managed care organization. Care Source supports Living Well in those counties by offering space for workshops on site, allowing paid staff to train as Living Well Leaders and to lead workshops, encouraging chronic care nurse case managers to refer appropriate members to Living Well workshops, and advertising Living Well in their newsletter.

- MVP Health Authority (formerly Mid-Valley Independent Physicians Association/MVIPA) offers the Marion-Polk Community Health Plan Advantage plan in Marion, Polk and Yamhill counties. As part of their quality improvement efforts in their model of care, the Living Healthy program provided more than 35 workshops to plan members and the community in 2010. Currently the program is funded by administrative dollars with the full anticipation that these services will be billable to OHP and Medicare in the future. Living Healthy is also a benefit covered under MVP Health Authority's Physicians Choice Medicare Advantage PPO plan.

Who to Talk to and How to Get in the Door:
Good initial contacts at a Medicare Advantage plan will be similar to those listed in the sections above (disease management or wellness coordinator, quality assurance, medical director, operations manager). Make sure to fine-tune your talking points and issue brief with information about the impact of chronic disease on older Americans; see the chronic disease fact sheet from the National Council on Aging[7]and the Healthy Aging in Oregon Counties[8] report for ideas.

[7] http://www.ncoa.org/press-room/fact-sheets/chronic-disease.html
[8] http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/Pages/healthyaginginoregoncounties.aspx

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Issue Brief: Living Well and Insurers

Chronic disease is putting our health care system under enormous pressure. Each year in Oregon, diseases such as cancer, heart disease, lung disease, diabetes and arthritis claim the lives of more than 19,000 Oregonians and result in $1.4 billion in hospitalization costs.

Although members with chronic conditions may know *what* they need to do to manage their disease, they often don't know *how*. It is critical to help Oregonians with existing chronic conditions live successfully and help them use the health care system as efficiently as possible.

The Living Well with Chronic Conditions Program

Oregonians are learning how to manage their chronic health conditions by participating in the **Living Well with Chronic Conditions** program and its Spanish language/cultural version, *Tomando Control de su Salud*. Living Well is delivered in a series of six weekly 2-1/2 hour workshops led by trained community members, many of whom have chronic conditions themselves.

Living Well is a proven program developed at Stanford University. The workshops teach people with chronic diseases to make healthy lifestyle choices and lessen the impact of their symptoms and of the disease itself. Participants have less pain and more energy. They are more able to live the lives they want, and gain the ability and confidence to care for their condition. Participants learn how to properly use medications, communicate effectively with health care providers, and evaluate new treatments.

Living Well improves quality of life by reducing fatigue and increasing physical activity, emotional and physical well-being and ability to function in social settings. After completing Living Well workshops, patients are healthier and better equipped to avoid unnecessary hospital readmissions.

Living Well and Insurers

As the number of Oregonians living with chronic conditions continues to grow, Living Well helps shift a portion of the health care burden off the delivery system while empowering and activating members. The average cost for someone to attend the six-week program is $375. Compare this to the thousands of dollars for an avoidable acute event.

An Oregon State University study of 4,000 program participants in Oregon found that they avoided an estimated 557 emergency department visits, 557 hospitalizations and 2,783 hospital days, yielding an anticipated health care savings of more than $6.5 million.[9] Although insurers may use different means of calculating their exact savings, the return on investment in the program is clearly significant.

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[9]Bovbjerg V and Kingston SJ. *Living Well Impact Report*, 2010. http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Documents/Living Well Program Impact Report Final.pdf

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Insurers can help make it possible for members with chronic health conditions to live successfully, for communities to embrace health and disease prevention, and to reduce the demand on our health care system:

- Help support delivery of programs in local communities by sponsoring workshops, assisting with workshop coordination, hosting leader training, referring patients, recruiting volunteers to provide workshops, and helping to publicize programs. Provide space and healthy snacks for classes, and consider underwriting scholarships for people with financial need.
- Consider making Living Well a standard part of your company's disease management offerings, and covering workshops as a primary benefit.
- Actively encourage members and employees to participate in Living Well through outreach and incentives.

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Talking Points for Insurers

These talking points are for use by Living Well programs when approaching funders. They are not to be handed out. Instead, leave behind the "issue brief" handout. Please remember, when you use these talking points, be sure to listen as much as you talk. The goal is to understand your prospect's perception of the program, and what they would need to support it.

- Acknowledgment:
  - Thank them for any current or prior engagement in or support/funding for the Living Well program and for the opportunity to talk with them now.
- The problem:
  - In 2005, diseases such as cancer, heart disease, lung disease, diabetes and arthritis claimed the lives of 19,219 Oregonians and resulted in $1.4 billion in hospitalization costs.
  - Nationally, the 27 percent of people with multiple chronic conditions account for 66 percent of health care spending.[10]
  - Nationally, 80 percent of older adults have at least one chronic condition, and 50 percent have at least two.[11] *(Note: use this talking point only for Medicare Advantage plans or plans that cover those dually eligible for Medicare/Medicaid.)*
- The solution:
  - Members with chronic conditions who can actively manage their diseases themselves use their benefits more judiciously, which means lower health care costs due to reduced emergency room visits and avoidable hospitalizations.
- The program:
  - Living Well with Chronic Conditions is a six-week workshop that provides tools for living a healthy life with chronic health conditions, including diabetes, arthritis, asthma and heart disease.
  - Living Well workshops teach people with chronic diseases to take the best care possible and, in many cases, lessen the impact of their symptoms or of the disease itself. Participants learn to deal with physical and emotional issues, gain tips on properly using medications and communicating with health care providers, and form relationships and a support system across the community.
  - Their entire family often benefits, too, as participants bring home new ideas for living well and integrate healthy behaviors into their routine, further reducing health care costs.
  - Dozens of organizations offer Living Well workshops around the state, and more than 5,600 Oregonians have participated in the program so far. Workshops are available in 27 counties, *including X*, and an online version is being piloted.

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[10] US Department of Health and Human Services. Multiple Chronic Conditions—A Strategic Framework, 2010. http://www.hhs.gov/ash/initiatives/mcc/mcc_framework.pdf

[11] http://www.cdc.gov/chronicdisease/resources/publications/AAG/aging.htm

- The impact:
  - Living Well improves the quality of life of participants by helping reduce fatigue and increase their physical activity, emotional and physical well-being, ability to function in social settings, and communication with their doctors, according to research conducted by Stanford University and replicated in several other studies.
  - An Oregon State University study of 4,000 program participants in Oregon found that they avoided an estimated 557 emergency department visits, 557 hospitalizations and 2,783 hospital days, yielding an anticipated health care savings of more than $6.5 million.[12]
- Why it matters to **insurers**:
  - Living Well helps shift a portion of the health care burden off the delivery system while empowering and activating members. Participants are likely to use their benefits more judiciously.
  - As the number of Oregonians living with chronic conditions continues to grow, Living Well can support the critical transition from hospital to home, helping prevent unnecessary re-hospitalizations.
  - The average cost for someone to attend the six-week program is $375. Compare this to the thousands of dollars for an avoidable acute event. Although insurers may use different means of calculating their exact savings, the return on investment in the program is clearly significant.
  - Living Well is a valued benefit that can set your business apart.
- What insurers can do:
  - Help support delivery of programs in local communities by sponsoring workshops, assisting with workshop coordination, hosting leader training, referring patients, recruiting volunteers to provide workshops, and helping to publicize programs. Provide space and healthy snacks for classes, and consider underwriting scholarships for people with financial need.
  - Consider making Living Well a standard part of your company's disease management offerings, and covering workshops as a primary benefit.
  - Actively encourage members and employees to participate in Living Well through outreach and incentives.

[12]Bovbjerg V and Kingston SJ. *Living Well Impact Report*, 2010. http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Documents/Living%20Well%20Program%20Impact%20Report%20Final.pdf

Aging Services Providers and Participant Fees

Aging Services Providers as Financial Sustainability Partners

Background
Area Agencies on Aging (AAAs) are federally mandated nonprofit or governmental organizations responsible for advocating for older adult needs in their community, and providing services covered by the Older Americans Act. AAAs exist in every community in the country, and Oregon has 17 Area Agencies on Aging. Under the Older Americans Act, each AAA gets federal funding to help provide services to seniors and people with disabilities, and must raise additional funding through county or local support, grants, and fundraising.

Why Aging Partners Would Want to Support Living Well
The frequency of many chronic conditions—arthritis, heart disease, stroke and high blood pressure—increases with age,[1] so it is important for aging services providers to support older adults in managing their conditions. Living Well offers an excellent opportunity to reach a larger segment of the older adult population at all income levels and assist them in maintaining their health, quality of life and independence. Participating in Living Well workshops has been shown to reduce health distress, fatigue, disability, and social role limitations.

The program is also a good way of raising the agency's profile in the community and creating new partnerships with health care providers, employers, and senior centers. While each AAA varies in staffing and roles, all develop four-year plans based on community needs, and ensure the availability of Older Americans Act services, which include information and referral, nutrition programs, family caregiver support, and health promotion/wellness. Living Well workshops are a natural fit.

How Aging Partners Can Be a Funding Resource
The Older Americans Act provides a small amount of health and wellness funding under Title IIID of the Act. While Oregon does not require these funds to be used to support evidence-based programs (as is the case in some other states), several AAAs in Oregon have chosen to support Living Well in a variety of ways:

- **Train staff and/or recruit volunteers to be trained as leaders**; examples include Community Connections of Northeast Oregon, Central Oregon Council on Aging.
- **Participate in federal and local grants to coordinate and/or provide Living Well programs**; examples include Mid-Columbia Council of Governments, Multnomah Aging

[1] Oregon Department of Human Services. Keeping Oregonians Healthy, 2007. http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/Documents/healthor.pdf

and Disability Services, Rogue Valley Council of Governments, and Oregon Cascades West Council of Governments.

- **Use Older Americans Act health and wellness funds (IIID) to support Living Well**; examples include Rogue Valley Council of Governments, Multnomah Aging and Disability Services, and Northwest Senior and Disability Services.
- **Refer clients and help promote workshops in the community**; for example, Northwest Senior and Disability Services.

In addition, the **Senior Community Service Employment Program** (SCSEP) is a national community service training program for people 55 and older living at or below 125 percent of the federal poverty line that can potentially support financial sustainability of Living Well programs. Participants are paid minimum wage to train with host agencies (nonprofit and public entities) to improve their job-readiness skills with an ultimate goal of obtaining unsubsidized employment. In Oregon, a number of SCSEP grantee organizations coordinate the Living Well program in different regions of the state. SCSEP allows grantee organizations to pay wages to the older adult participants for time spent in job-readiness-related training, including Living Well. SCSEP grantees can also pay for training-related costs and transportation.

Examples

- Multnomah Aging and Disability Services, the AAA for Multnomah County, works through its district centers to provide services to older adults and people with disabilities. Multnomah Aging and Disability Services has participated in a multiyear grant from the Administration on Aging to support Living Well and other evidence-based healthy aging programs. As this federal grant funding ends, Multnomah Aging and Disability Services is revising contracts with these district centers to require that each center provide at least one Living Well workshop per year, using Older Americans Act and county funds to support this service and a part-time coordinator for the program.
- SMS is the SCSEP grantee organization for Multnomah and Washington counties. In 2010-2011, SMS is participating in a small grant from the Department of Labor to develop referral systems for older adult SCSEP participants to participate in Living Well programs offered by Multnomah Aging and Disability Services and Tuality Healthcare in Washington County. While the grant is helping provide some additional funds to develop this system, SMS has the ability to continue to provide reimbursement for Living Well programs using existing training funding once the grant ends.

Who to Talk to and How to Get in the Door

Getting in the door may require obtaining some internal “buy-in.” An important first step will be to determine what the organizational chart looks like for your local AAA and who their partners/contractors are. The list of AAAs in Oregon can be obtained from the Oregon Association

of Area Agencies on Aging and Disability (O4AD) website.[2] Ask yourself: Where could you gain some allies? Where do you already have some internal support for Living Well? Good places to start may be with the Information and Assistance Team (I&A), community care nurses or case managers.

> "**I&A":** Let the I&A staff or team know about upcoming Living Well workshops you are offering. AAAs want to know about local resources and services so they can properly inform and link those inquiring and in need with services, options and support that is available. Oregon AAAs are now using a statewide website – www.ADRCofOregon.org – to help consumers find resources relating to aging and disabilities. Be sure your programs are listed and updated on this website.
> **Community Care Nurses and Case Managers**: Add various case managers, community care nurses, and AAA managers to your e-mail/mailing list to promote workshops. Ask about attending one of their team meetings to explain Living Well and promote the benefits of the workshop and the fact that it is evidence based.

Once Living Well is well known in the AAA and there is some internal buy-in from team members, collaborations and more significant endeavors could then be explored either directly with the AAA or with their partners and contractors.

Another potential step would be to network with communities where the AAA is well versed in Living Well and inquiring if that director would speak to the director in your community to help make the introduction and provide support or testimonials about the benefits of Living Well collaborations. Specific examples include Rogue Valley Council of Governments, Oregon Cascades West Council of Governments, and Multnomah Aging and Disability Services. AAA directors frequently network and attend statewide meetings and local/national conferences, so this task would not be out of the norm.

Participant Fees as a Source of Program Funding

A minority of Living Well programs across Oregon charge fees to participants; amounts charged in 2009 ranged from $5 to $120, with a mean of $30. While many organizations are able to offer workshops free of charge or at a modest fee due to grant or foundation funding, this is not a sustainable model in the long term, nor is it likely to allow for program growth beyond grant requirements. Charging for workshops can create a barrier for participants and pose logistical issues for some organizations. However, a diversified approach to funding that respects participants' ability to pay has been demonstrated to be most sustainable.[3]

If your organization is considering participant fees as part of its overall funding structure, keep in mind the following considerations:

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[2] http://o4ad.org/memberagencies1.html
[3] The National Council on Aging, Center for Healthy Aging. *Financial Sustainability for Evidence-Based Programs: Strategies and Potential Sources of Financing*, 2007.

- Establishing a sliding scale or donation basis for participant fees can help to alleviate barriers for low-income participants. It may be possible to identify a local organization wiling to underwrite scholarships.
- Program fees can help establish the value of a program in the minds of participants, and may help to increase retention throughout a workshop series.
- If multiple partners are providing programs within a given community or region, setting consistent fees will reduce potential confusion for participants and program funders.

Helping People with Chronic Diseases Live Well

A presentation to: [NAME]
Presented by: [NAME, AFFILIATION]

(Date)

Chronic Conditions

Consider the magnitude of chronic disease:

- The 27% of Americans with multiple chronic conditions account for 66% of health care spending.[1]
- Every year in Oregon, chronic diseases:[2]
  - Claim the lives of 19,219 Oregonians.
  - Result in $1.4 billion in hospitalization costs.
- [*Add local statistics here*]

[1] US Department of Health and Human Services. *Multiple Chronic Conditions—A Strategic Framework*, 2010.
[2] Oregon Public Health Division. *Keeping Oregonians Healthy*, 2007

Chronic Conditions (cont'd)

We can prevent or lessen these impacts through:

- Eating healthfully.
- Moving more.
- Avoiding tobacco use.
- Getting regular health screenings.
- Communicating better with providers, loved ones and caregivers.

We must create opportunities that put healthy options within reach of everyone.

The Living Well with Chronic Conditions Program

- Six-week workshop, 2-1/2 hours per session
- Free or low-cost to participants
  - Actual program cost is $375 [*or local cost*]
- Led by trained peers living with chronic health conditions

The Living Well with Chronic Conditions Program (cont'd)

The workshop teaches skills for managing chronic health problems:

- Setting achievable goals and problem solving.
- Dealing with fatigue, frustration, and pain.
- Maintaining strength and flexibility.
- Properly using medications.
- Communicating with health care providers.
- Evaluating new treatments.

Living Well ~ Impacts for Oregon

- More than 5,600 Oregonians have participated.
- Dozens of organizations offer workshops in 29 Oregon counties.
- Tomando Control de su Salud: culturally adapted, Spanish-language version.
- Helped participants avoid more than $7 million in medical costs due to emergency room visits and hospitalizations.

Living Well ~ Funding

Currently funded by time-limited sources:

- Oregon Health Authority/Department of Human Services
- US Centers for Disease Control and Prevention, US Administration on Aging
- [*Add local time-limited funding sources here*]

Living Well ~ Funding (cont'd)

Background:

The cost of delivering Living Well programs is not covered through state or federal grants.

The result:

- Programs are supported by strong local partnerships and aren't dependent on federal or state dollars.
- Programs must be "owned" locally, with long-term financial support.

Living Well ~ Funding (cont'd)

To ensure Living Well is accessible to all Oregonians with chronic diseases, and to make it a regular part of our health care system, we seek to invest:

- [*Add overarching uses of funds and amounts needed, over what time period*]
- [*Shoot for three to five bullets*]
- [*Customize based on your specific ask to your specific prospect*]

Living Well ~ Generating Support

We ask for your help in generating support for the program:

- Share with others what you've learned today.
- Advocate for funding for this program.
- Connect me with potential long-term funding sources.
- [*Customize based on your specific ask to your specific champion*]

Why It Matters ~ Hospitals

- Prevent unreimbursed hospitalizations and emergency room visits.
- Help patients improve communication with their health care providers.
- Provide a valuable community service by helping people with chronic conditions feel better, stay independent and increase energy and self-confidence.

What Hospitals Can Do

- Help support Living Well:
  - Sponsor workshops.
  - Host leader training and recruit volunteers to lead.
  - Refer patients and publicize programs.
- Make Living Well a standard health education offering:
  - Provide space and healthy snacks.
  - Underwrite scholarships.
- Make Living Well a routine offering at discharge and a standard employee benefit.

Why It Matters ~ Insurers

- Helps members avoid the emergency room and unnecessary hospitalizations.
- Help members improve communication with their health care providers.
- Shifts a portion of the health care burden off the delivery system while empowering and activating members.

What Insurers Can Do

- Incorporate Living Well into standard disease management offerings.
- Cover workshops as a primary benefit.
- Provide outreach and incentives to encourage members and employees to participate.
- Help support delivery of programs in local communities.

Why It Matters ~ Employers

- Build a healthier, more successful and productive workforce.
- Keep valuable employees at work.
- Prevent unnecessary worker's comp claims, emergency room visits and hospitalizations.

What Employers Can Do

- Make Living Well a standard employee benefit and encourage employees to use it.
- Ask your health plan and employee assistance program to include Living Well workshops as a covered benefit.
- Host Living Well workshops at your worksite. Publicize Living Well programs to your employees, and provide incentives for participation.

What Employers Can Do (cont'd)

- Develop flex time or sick leave policies that support employees in attending Living Well workshops.
- Encourage Living Well for family members of employees, and support employees in attending with family members.
- Support employees who want to be trained as Living Well leaders, through flexible work arrangements.

Thank You

With your support, the Living Well program can help make it possible:

- To reduce the demand on our health care system.
- For communities to embrace health and disease prevention.
- For people to **Live Well with Chronic Conditions**.

Thank you for your consideration!

Contact Information

[*Your name, title, organization*]

[*Your phone number*]

[*Your email*]

[*Local phone/web address for program information*]

Statewide program information:

1-888-576-7414

www.healthoregon.org/livingwell