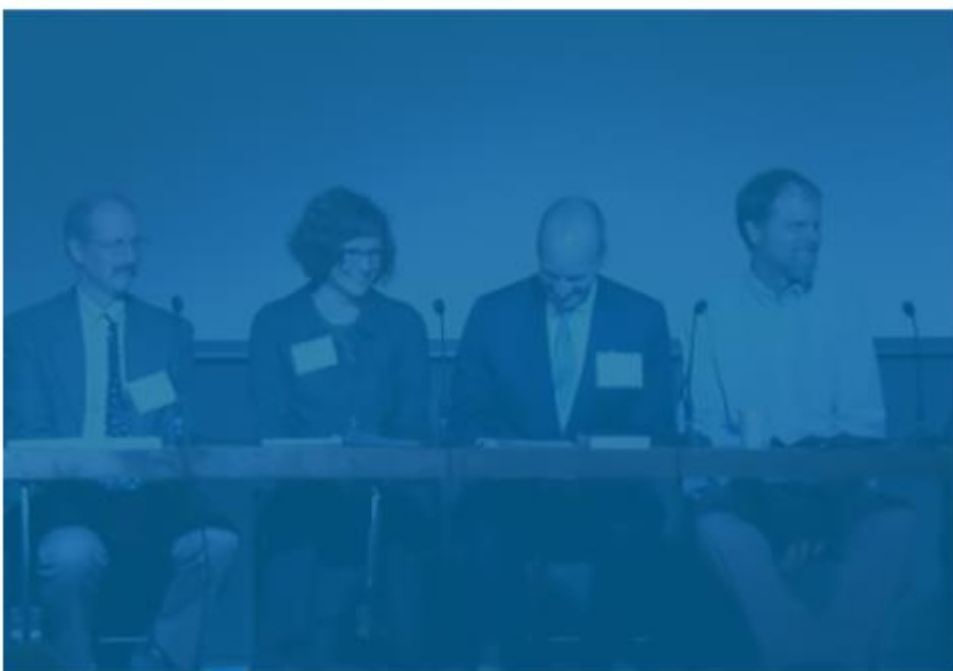




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Choosing Wisely Town Hall Meeting Action Manual



ConsumerReports[®]



Robert Wood Johnson Foundation

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INTRODUCTION: CHOOSING WISELY

An initiative of the ABIM Foundation, *Choosing Wisely* is working to spark conversations between providers and patients to ensure the right care is delivered at the right time. Participating organizations have created lists of “Things Providers and Patients Should Question,” which include evidence-based recommendations that should be discussed to help make wise decisions about the most appropriate care based on a patient’s individual situation. More than 70 specialty societies have joined the campaign since its inception in 2012, and new lists continue to be published.

Consumer Reports is developing materials for patients and disseminating them through a coalition of groups with broad access to consumers. Its goal is to help patients engage their physicians in these conversations and empower them to ask questions about what tests and procedures are right for them. Choosing Wisely Town Hall Meetings offer a strategy to further extend outreach to the general public.

*The Choosing Wisely Town Hall Meeting Action Manual focuses on a strategy for building consumer and community awareness and engagement. It contains a step-by-step guide, tools, resources, and a detailed example of a successful Town Hall Meeting to help you successfully plan and conduct your own Choosing Wisely Town Hall Meeting.**

STEP 1: DEFINE YOUR GOALS AND SET YOUR AGENDA

Defining goals for your Choosing Wisely Town Hall Meetings will drive everyone involved toward a clear, shared purpose and provide a path toward gaining buy-in from all key stakeholders, including leadership teams such as organization and/or project directors, media members, and physician champions.

Goal Setting:

Goal setting drives a project forward and provides a benchmark for success. You may want to consider setting SMART goals, which are:

- Specific
- Measurable
- Attainable
- Relevant
- Timely

Examples of SMART goals for a Choosing Wisely Town Hall Meeting are:

* This Action Manual is intended to guide the sponsoring/planning group in steps in developing and holding a Choosing Wisely Town Hall Meeting. It is not intended as a manual for participants.

1. Hold three town hall meetings in the fall of 2015 in different areas or regions of the state and via various communication modes, such as webcasting for remote site participation, reaching a minimum attendance of 50 community members in each meeting.
2. Discuss Choosing Wisely topics that relate to children's antibiotic overuse at five PTA meetings, and hand out the Consumer Reports consumer-facing brochures on each of these topics as a take-home resource. Hold the town halls in late autumn, as cold and flu season approaches, with a goal that each parent shares the resources with at least five additional parents.
3. Persuade 25% of town hall attendees to sign up for one or more Choosing Wisely programs, such as a hospital's patient advisory group or a national health advocacy group, and follow up with those attendees on a quarterly basis.

Barriers and Challenges:

As you define your goals, also consider potential barriers and challenges that may arise. What will you do if very few people sign up for your town halls? What if you cannot find a meeting space within your budget? Do you have a back-up facilitator or speaker if yours cancels at the last minute? How will you ensure media coverage, both to market your event and for stories immediately afterwards? Part of goal-setting is anticipating challenges that may arise and preparing solutions.

Agenda Setting:

Once you've defined your goals, you'll want to set an agenda and determine the flow of the event. For example, will you have a locally (or nationally) known speaker who may help you draw a crowd? Will you link your event to an existing event that is known to attract your target audience? Is your end goal for all attendees to commit to engaging in conversation with their doctor at their next appointment, or is it perhaps to have people tell stories about medical overuse so that the media can become more engaged and give a louder voice to your campaign? How can you incorporate both presentations and group discussion?

STEP 2: DETERMINE AUDIENCE, LOCATION, AND DATE

Now that you have determined your goals for your Choosing Wisely Town Hall Meeting, the next step is to start thinking about logistics. Who will you invite? Where and when will you hold the town halls? Who will facilitate them? Will there be food, raffles, or other activities?

Target Audience:

Create a list of the potential audience types of members to reach with your key messages. Be sure to consider, as appropriate:

- Diversity of audience, including age, gender, race, health status, socioeconomic factors, and educational and literacy levels;
- Language, including a need for interpreters and handouts in appropriate languages; and,
- Familiarity with topics to be presented, and readiness to accept and make changes.

- ❖ **Lesson Learned:** An organization was having a difficult time reaching monolingual Spanish-speakers who were living in a rural area, many of whom had great distrust and skepticism of authorities and "organized events." To improve outreach, in addition to creating flyers only in

Choosing Wisely

Spanish, at a very basic literacy level and with cultural nuances known specifically to this population, the organization had the flyers hand-distributed by a volunteer who lived in the area and knew the target audience well. Because of this trust, the thought put into the creation of the flyer, and the promise that the meeting would be held in Spanish and facilitated by someone who grew up in a neighboring region, attendance was far higher than anticipated. Additionally, because the volunteer was able to explain in detail what to expect at the event, people came primed to discuss the otherwise-challenging topic and eager to start making behavior changes.

Location:

Consider locations, including geographic (which town? which side of town?) and venue (public library? church? community center? hotel conference room?). Be sure to consider, as appropriate:

- Holding town halls in multiple locations if you're trying to reach people across a large area;
- Offering participation through webcasts as well as face-to-face;
- Locations with easy and/or free parking and/or easy public transportation access; and,
- Venues that are familiar and comfortable to those who are invited, and accessible to those who may have physical limitations.

- ❖ **Lesson Learned:** An event was held for people with physical disabilities who wanted to learn more about their health care benefits. The event was on the 10th floor of a building, which was fully accessible by elevator. The meeting room was set up in a configuration that was welcoming and accommodating to those with various physical challenges. However, midway through the event, there was a fire alarm, which locked the elevators and trapped almost all attendees on the 10th floor. Even though the building had been accessible to enter and the meeting room was properly arranged, an emergency-exit strategy for so many people who needed elevator access had not been considered.

Time and Date:

Consider what time of day and which days of the week will be best for those you are trying to attract. Be sure to consider, as appropriate:

- Holding town halls at multiple days and times, such as evenings for busy professionals, or mid-morning for those who are retired, and
- Potential competing local events and holidays.

- ❖ **Lesson Learned:** The staff member in charge of planning a town hall meeting had just moved to a town that revolved heavily around a particular religious calendar. Unknowingly, the staff member planned the meeting for a day of huge cultural importance, and secured meeting space and speakers who planned to fly in from around the country. Upon learning of this oversight, the meeting date was changed so that attendance wouldn't be negatively impacted.

Additional Logistics Issues:

To make your town hall as successful as possible, and to encourage attendance, consider the following questions:

- Do you need to provide childcare?

- Is your town hall at a mealtime? If so, can you provide food and drinks?
- Will people need help with transportation in order to attend? Can public transportation vouchers be provided?
- Do you want to offer incentives, such as raffle prizes or other giveaways?

❖ **Lesson Learned:** Events were being planned for low-income adults in an urban area on weeknights from 6:00 – 8:00. Although targeted invitations were sent to more than 100 individuals who had informed the sponsoring organization that they wanted to learn more about preventive health issues, only about three adults said they planned to come. Upon providing free bus tickets (one-way vouchers mailed to respondents, with a promise for a return ticket upon attendance), and offering free high-quality childcare, free dinner (for parents and children) and topical, culturally sensitive giveaways (children’s books about the particular health issue being discussed at the event), attendance skyrocketed to 75, plus children. (The local transit authority donated bus vouchers, and a local major grocery store chain donated dinners. Well-vetted volunteers provided the childcare, and the giveaways were procured through a small grant.)

STEP 3: CREATE YOUR MARKETING PLAN

Now that you’ve determined your target audience and where and when you want to hold your Choosing Wisely Town Hall Meeting, you’ll want to think about marketing materials, messages, and methods.

Marketing Materials and Messages:

You’ll want to create marketing materials and messages to increase awareness and interest in the Choosing Wisely campaign, and ultimately in attending your town hall meeting. To do this, consider:

- Revisiting your goals (Step One, above) and repurposing them into a simple, clear and concise statement;
- Preparing your “elevator speech,” a one-page flyer including your goals and meeting logistics, and content for your website. Be sure to test your materials with members of your target audience; and,
- Including any “incentivizing” information in your marketing materials, such as raffle prizes, special guest speakers, free food, childcare, and/or parking.

Marketing Methods:

Once you’ve created your marketing materials and messages, you’ll next want to consider how to use them to reach your target audience. Think through:

- Posting regularly on established social media outlets;
- Sending press releases or other materials to local newspapers and TV/radio stations;
- Leaving flyers, posters and information at local businesses, community centers, health care facilities, public libraries, large employers (especially leading up to and during open enrollment periods), chambers of commerce and other business associations, and Rotary clubs;
- Leveraging any personal relationships your staff may have with your targeted audiences; and,
- Providing turn-key articles and information to hospitals, physician offices, and health plan newsletters.

STEP 4: TIPS TO RUN A SUCCESSFUL TOWN HALL MEETING

In preparing for your town hall meeting, you'll have set an agenda, booked a speaker (or speakers), and decided upon a facilitator. To ensure the success of your event, you'll also want to plan ahead for all meeting logistics, including talking points, room configuration, and more.

Choosing Speakers and Facilitators:

- Having a well-known guest speaker can help bring a larger audience to the town hall meeting.
- It is important to understand the characteristics of the community and pick a speaker who is both well-known and fits the culture of the community. Some figures might have local or national prominence but be a polarizing figure in the discussion.
- Local journalist or TV/radio personalities are often skilled facilitators and can improve the quality of your program.
- Speaker can set the tone for the meeting so understanding and choosing your speakers in context to the perspective he or she brings to the topic can help guide conversations.
- If you plan to use a panel, it's important that multiple perspectives be represented. It is important to include both a patient voice and a clinician. Other perspectives to consider include a large employer, someone from a well know health system or plan, the local chamber of commerce or a community group such as AARP.
- The main purpose of the town hall meeting is to create a conversation within the community and the audience. The talk should be a brief and directly related to the goal of the event.

Prepping Speakers and Facilitators:

- Ensure that your speakers and facilitators know and understand your key messages, meeting goals, the demographics of your target audience, and any outcomes that have been promised. Provide talking points well in advance. Meet to go through the talking points and brainstorm responses to potential questions and areas of concern that may be raised.
- Request bios from your speakers so that their introductions are seamless and dynamic.
- "Plant" certain meeting attendees to initiate discussion if it does not arise organically. Make certain to vet their questions and conversation topics or provide them with specific ideas.
- Be sure that your facilitator and speakers know the start and stop times of your event, and are respectful of them. Assign a staff member or volunteer to be the timekeeper at the event and discreetly let speakers know when they should start to wrap up.
- Ask your speaker or facilitator to end the event with a "challenge" to all attendees, so that they leave with an action plan and concrete next steps.

- ❖ **Lesson Learned:** After months of planning for an event about how to best access and use health benefits, securing the ideal location (at no cost), bringing in translators of seven commonly-spoken languages within the community "just in case," and thinking through seemingly every single detail, it was time for the event to begin. The room was packed, media members had arrived, and the main speaker, also functioning as a facilitator, was known to have a great deal of content knowledge and the ability to answer any question that came his way. Unfortunately, the one component that had not been vetted was the speaker's public-speaking ability, which turned out to be dry, monotonous, and not at all relatable to the audience. In addition, the speaker had

poor time management skills, and therefore only covered a small portion of the agenda before the event ended. Attendees left the event feeling confused and discouraged, and had not gained the new information they had sought. In order to ensure good speaking skills, go to other events where the speaker is presenting, try to find a video of a presentation, or find multiple people who have seen the speaker and can attest to his or her public speaking abilities.

Prepping Your Meeting Space:

Plan to arrive at least two hours before your event to make sure you have time to set up your meeting space, test any audio-visual equipment, and greet any attendees who arrive early.

- As much as possible, organize the meeting space in a comfortable and inviting setting. Make sure that it does not feel threatening. Set chairs and tables in a semi-circle if possible, inspiring more conversation and less formality. Keep physical accessibility for all in mind.
- If you are offering food and/or drinks, set them up in a welcoming location but one that will not disrupt the flow of the event when people access them.
- Have a designated “check-in” area where people can sign in, take name tags, and pick up any other relevant materials, perhaps including a meeting agenda. Also, have a designated “check-out” area where at the end of the meeting, people can turn in their evaluations and pick up any “freebies,” which can include small sizes of the Consumer Reports 5 Questions poster.
- If weather calls for it, make sure to have somewhere to store coats or umbrellas.

STEP 5: STEPS TO TAKE AFTER THE TOWN HALL

Throughout your planning process for your town hall meeting, you’ll want to also plan ahead to evaluate it and look for areas of improvement. This can include both internal and external evaluations.

Internal Evaluation:

Poll your event planners, speakers, facilitators, and any others who were involved in planning and holding your event to find out what they thought went well and what could be improved in the future.

This can include:

- Creating and disseminating a brief online survey to determine what areas of the planning process and actual event flowed well in their opinion, and which areas could be improved upon, and
- Holding an in-person meeting to discuss all of the planning and implementation steps, noting what you would want to do again, and where changes could be made.

External Evaluation:

Ask meeting attendees what they thought went well and what could be improved. Ways to do this can include:

- Polling meeting attendees, immediately after your event and before they leave, and/or with a follow-up survey. *See attached evaluation sample from HealthInsight Utah as an example.* Consider offering incentives for completing surveys, and
- Follow-up with attendees who are willing to share their stories with the media and/or those committed to next action steps, such as joining a patient advisory committee.

ADDITIONAL RESOURCES:

- [Choosing Wisely](#)
- [Consumer Reports' Choosing Wisely materials](#)
- [Consumer Reports' Choosing Wisely Implementation Guide](#)
- [SMART Goals](#)
- [Event Planning Checklist](#)
- [ACEP Guide to Organizing, Planning and Executing a Town Hall Meeting](#) [Caring Connections: Convening Town Hall Meetings](#)
- [How Not to Conduct a Town Hall Meeting](#)

CHOOSING WISELY TOWN HALL EXAMPLE:

Maine Quality Counts (MQC), an independent, multi-stakeholder regional healthcare collaborative dedicated to transforming health and health care in Maine, has generously provided the following details of its November 6, 2014 Choosing Wisely Town Hall Meeting. You can also view the entire meeting [here](#).

Purpose Statement

“Our purpose for this Health Care Town Hall Meeting is to help facilitate conversations that can take place in your home and your community. We are hoping that those who attend the meeting will work together to identify action steps that will lead to change in Maine’s health care system.”

Goals

- Reach a minimum of five separate communities of health care consumers
- Have a minimum of 75 in-person attendees at the town hall

Marketing Plan

- Engaged Shannon Brownlee as a keynote speaker. Ms. Brownlee is an engaging and known speaker, and the author of the 2007 book *Overtreated: Why Too Much Medicine is Making Us Sicker and Poorer*.
- Prior to the town hall, staff from MQC distributed 110 copies of Brownlee’s book to Area Agencies on Aging (AAA) and other community organizations. MQC already had a very good relationship with the AAAs, which are able to engage many older adults. The AAAs distributed the books to interested older adults as part of a local book club effort, in which they encouraged people to read the book prior to the town hall and then gather on the night of the town hall to discuss the book and watch the event together via live video streaming. (More details on the live streaming are below.)
- Created and distributed flyers through local conferences, patient centered medical home practices and health homes throughout the community, partner organizations, websites, email lists (general, advocacy, and personal), and newspaper ads the week before the event. (Three reporters attended the town hall and wrote follow-up stories in their newspapers.)

Meeting Set-Up and Facilitation

MQC chose to hold its town hall in a popular café with a theatre space. This space regularly hosts film screenings, musical performances, and community events. MQC chose the space in part because it was a

very popular gathering spot with well-established channels for promoting events (i.e., email newsletter, Facebook, etc). In addition, the space was affordable and could be set up for both lecture and group discussion.

The keynote speaker was recruited and confirmed, along with a panel of local health care and community leaders who could respond to the keynote address and stimulate dialogue with the attendees, who were members of the general public. MQC created a discussion guide that the moderator used to guide the discussion and questions after the completion of the keynote presentation. Each discussion point and question included talking points, and was circulated internally prior to the meeting to allow for feedback from the keynote speaker and other panelists.

The panelists added significant value not only as speakers, but also as promotional allies. Panelists were from the local hospital and an Area Agency on Aging, and both of those organizations promoted the event to their staff and stakeholders.

In addition to hosting the event at the main location where Ms. Brownlee presented, several “viewing events” were held throughout the state. MQC encouraged other groups, such as AAAs, to host these for those who wanted to join remotely. At least three groups held “viewing events,” leading to approximately 75 – 100 people joining remotely. Offering live streaming of the event was of particular use to MQC, since much of the state is rural and a large part of the potential audience lived far from the meeting location.

Evaluation/Resources and Follow-up

All town hall attendees received a post-event follow up evaluation, which the organizers used to determine areas of improvement for future town halls, learn how attendees first heard about the event, find out who wanted follow-up information, and more. Attendees were also asked to complete half-page “action plans” in which they responded to questions such as, “What can I do differently based on what I learned at today’s event?” When people left the meeting, they were given Consumer Reports’ Choosing Wisely information and links to consumer-friendly web sites supporting Choosing Wisely and its concept.

MQC’s March 2015 Town Hall

On March 18, 2015, MQC hosted another town hall meeting, for which it has graciously offered to share details. Please see the attached meeting summary, which includes an overview and sections on audience development, media outreach, and evaluation.