

THE ROAD AHEAD FOR SERIOUS ILLNESS CARE: Convener's Guide

Introduction

On October 31, 2016, more than seventy leaders from around California convened in Sacramento for "*The Road Ahead for Serious Illness Care in California*" – a daylong conversation hosted by the Coalition for Compassionate Care of California (CCCC) and the California Health Care Foundation (CHCF) on the topic of serious illness care in California. Attendees represented a wide range of stakeholders, including healthcare professionals, organizations, policymakers, academics, patients and more. The day provided an opportunity for participants discuss progress, gaps and opportunities related to serious illness care in our state. It was an ambitious day to help pave the way for the road ahead, working collaboratively to achieve a shared vision and agenda for living well with serious illness in California.

Bringing the work of *The Road Ahead* to your local community will allow you to build on the accomplishments of the statewide convening and move into local-level strategy that is specific and action-focused. You will address both the "what" and the "how" of improving serious illness care in your area while strengthening relationships and building collaboration. *The Road Ahead* also provides an excellent way to reinvigorate an existing coalition or to jump-start a new one.

The Road Ahead convening will support your local efforts by:

- Engaging community leaders from across stakeholder organizations
- Leveraging the rich findings from the statewide meeting to assess local needs and jump-start local action
- Providing a framework for people to organize into work groups or activate a coalition
- Gathering ideas for how the Coalition for Compassionate Care of California can support your local work

The Road Ahead Toolkit includes:

- This Convener's Guide with event organizing tips
- The graphic illustration files from the original event for printing as handouts or posters
- A Facilitator's Agenda

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- A customizable PowerPoint slide show
- A local assessment tool built on key findings from the state meeting
- An action plan template
- An event evaluation form

Using CCCC's *The Road Ahead* Materials

The materials from the statewide gathering have been adapted to make them easy to use in local settings. They can be further revised to suit your local community's needs and interests. The goal is to hold an event with content, activities, and outcomes that are as relevant as possible for your community while also building connection to the larger statewide network. You may rebrand the materials with local coalition or other event host or sponsor names, but please also credit CCCC and CHCF in your materials.

The Road Ahead presents and builds on findings from the 2015 *Dying in California* report, which was based on the 2014 publication *Dying in America: Improving Quality and Honoring Individual Preferences Near the End of Life*, from the Institute of Medicine. To review these reports, please visit the webpage for the Road Ahead Toolkit on the CCCC website coalitionccc.org/road-ahead-toolkit.

Attracting influential people to your event

The purpose of *The Road Ahead for Serious Illness Care* is to bring together people who have the ability to advance progress within their work setting or network, either as "doers" or "influencers." Including representatives from a diversity of organizations ensures a variety of perspectives and expands opportunities for collaboration. In addition to those directly involved with serious illness care, consider inviting leaders from organizations whose mission overlaps with serious illness, including foundations, academics, faith leaders, community clinic providers, seniors' services providers, health communications experts, and patients. Involving key leaders from the beginning, either with a phone call to solicit their input or an invitation to a planning meeting, helps them invest in the success of the event. Key organizations can act as event co-sponsors, providing the meeting venue, meals, or other material support, as well as help with hosting and facilitating the meeting.

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Planning your event

Plan and organize the event in the way that best engages the stakeholders in your area and suits your resources. Below are general suggestions for creating an effective event.

1. **Consider convening an event planning team**

A planning meeting with key leaders will build buy-in, increase participation, and ensure that content and logistics reflect the interests of these agencies. The goals of the planning process are to:

- Agree on goals and outcomes for the convening
- Identify stakeholders and create a list of invitees. A group of at least 25-30 will ensure a good exchange of ideas; larger groups work well too.
- Assign key event roles, including a coordinator, event hosts and sponsors, and facilitators for the meeting.
- Decide on the budget, venue, date, and time
- Determine how and when invitations will go out

2. **Create a plan for following up on resulting goals and next steps**

At the local level, *The Road Ahead* ideally will result in clear goals, priorities, and action steps. Subsequent follow-through will require on-going participant engagement and accountability. If you have an existing local coalition, event follow-up can be integrated into the coalition's agenda. If you want to start a coalition, forming work groups around the meeting action plan is a good way to get things rolling. If you are operating outside of a coalition model, the planning team or an ad hoc leadership group can be tasked with coordinating follow-up. Whatever mechanism you decide on, make sure that the follow-up process is clearly reflected in the implementation and wrap-up sections of the meeting so that everyone leaves with a clear understanding what to expect. (See the Facilitator's Agenda.)

Hosting your event

Schedule

The original *The Road Ahead* was a 6-hour event held from 8:30 am to 2:45 pm with 30 minutes of networking at the beginning, a 45-minute lunch, and a 15-minute afternoon break. The Facilitator's Agenda included in this kit is adapted from the state meeting and

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totals 5 hours and 5 minutes. It does not include lunch, which can be added. If needed, trimming off some agenda items or reducing the amount of time allocated to each activity can shorten the event.

Setting

The Road Ahead is designed around participant interaction and input. Since much of this activity takes place in small groups, a setting with multiple tables that seat 4-8 people each is ideal. If that is not possible, choose a venue with enough space for separating breakout discussion groups.

Roles for the day of the event

You will need at least one primary host/meeting facilitator, a meeting scribe, and at least four facilitators to elicit, record, and report on group discussions from breakout discussions.

After your event

Feedback from your event helps CCCC support your local efforts to improve serious illness care and strengthens our statewide network.

We encourage you to complete our event convener's feedback form. Please send us: (a) the feedback form; and (b) the results from your discussion group surveys on how CCCC can best support local work. You may also contact us with any questions about the Toolkit. Mail or email to:

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