



THE ROAD AHEAD FOR SERIOUS ILLNESS CARE: Facilitator's Agenda

[Insert date, time]

(Additional presenter talking points are included in the PowerPoint presentation)

Goals for the day

1. Assess progress, gaps, and opportunities in serious illness care in our community
2. Strengthen relationships and collaboration
3. Create a shared vision for the future
4. Define and prioritize next steps for local action

TIME

SUBJECT

00:00-00:00 Welcome, Introductions & Setting the Stage
(10 min)

- Purpose and objectives for the gathering
- Introductions: Name, organization, role, and one thing you'd like to leave with

00:00-00:00 The Road We've Been On— California (*Presentation*)
(20 min)

- Background: Fall 2016 Convening in Sacramento - Gathered leaders to look at "The Road Ahead for Serious Illness Care in California"
- Anniversary of 2015 *Dying in California* report, based on the seminal IOM *Dying in America* report
- Review overall findings from *Dying in California* report
- Review four central focus areas:
 - **Topic 1: Delivery of Care**
 - **Topic 2: Clinician-Patient Communication & ACP**
 - **Topic 3: Professional Education & Development**
 - **Topic 4: Public Education & Engagement**

Note that policy and payment systems were an additional focus area in the IOM report, but are interspersed throughout these four focus areas

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00:00-00:00 The Road We've Been On— Our Local Accomplishments (*Small group activity*) (35 min)

- Introduce the activity: The goal is to take time to capture and acknowledge local progress. There will be 20 minutes for small group discussion.
- Make sure there is a designated scribe (or have a facilitator at each table)
- Direct participants to go around their table and each take a few minutes to share what they think are some of the most important local strengths and accomplishments in any of the above four topic areas.
- Have each group choose a person to report back to the full group. Have a meeting scribe capture accomplishments on a central flip chart visible to the full group. (15 minutes)
- **Note:** *have handouts with copies of the graphic illustration posters on each table*

00:00-00:00 Visioning: The Road Ahead (*Presentation followed by discussion*) (35 min)

- Presentation: Review of CCCC's 10-Year Vision for California
- Small group discussion (at tables or in breakout groups of 4-5).
 - Have participants discuss the question: *What is our local version of this vision? What would you change or add to make these points as relevant as possible to our local needs and goals?*
 - Make sure there is a designated scribe (or have a facilitator at each table)
 - **Note:** *Each table will have handouts of the CCCC 10-year vision.*
- Have each group report back to full group after 15 minutes of discussion.
- Take another 10 minutes to have a note-taker capture comments from all groups on a central flip chart visible to the full group.
- **Note:** *Flip chart pages can be prepared in advance to mirror the topics covered in the CCCC vision handout.*
- Full group discussion: Take another 10 minutes to see if the full group can arrive at consensus on a shared vision. (Consensus is not essential.)

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00:00-00:00 Break (15 Minutes) [Can be longer to accommodate a lunch break]
(15 min)

00:00-00:00 Assessing Gaps and Opportunities (*Breakout exercise*)
(60 min)

- Introduce the activity: *The Road Ahead* gathering in Sacramento resulted in a compilation of ideas and recommendations for furthering progress in each of the four topic areas. We are going to use these ideas as a jumping-off point for assessing local needs and opportunities and moving into action steps.
- There will be two, 30-minute facilitated "discussion circles."
- Participants are to choose the two topics of highest interest/relevance to their work. They will spend 30 minutes at one topic table and then rotate at the 30-minute mark to the second area of their choice.
- (**Note:** *Assign prepared facilitators for each of the four topic areas in advance. Facilitators will stay at the topic table; participants will rotate. The topic area posters or a sign designating the topic should be posted at each table for easy identification. Facilitators will have copies of the "Assessing Needs and Opportunities" tool for their designated topic areas at their table. Each table will also have copies of "Ideas for Support from CCCC."*)
- 1ST Rotation = 00:00-00:00; 2nd Rotation = 00:00-00:00

Topic 1: Delivery of Care- Name of facilitator

Topic 2: Clinician-Patient Communication & ACP- Name of facilitator

Topic 3: Professional Education & Development - Name of facilitator

Topic 4: Public Education & Engagement- Name of facilitator

Note: *remind participants that policy and payment systems can fall within these topic areas as well*

- Using the "Assessing Needs and Opportunities" tool, facilitators will guide participants to 1) Discuss where the greatest needs and opportunities are in their local serious illness care network (adding items if they are not

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already listed) and 2) Choose the top four and brainstorm action steps to address each one.

- **Note:** *Facilitators will remind participants that action and implementation depend on people's willingness to do the work involved. Encourage people to be thinking in terms of actions they are willing to lead or help with.*
- Each group will also spend a few minutes prioritizing from the list of "Ideas for Support from CCCC"

00:00-00:00 Report-Out on Needs and Opportunities (40 min)

- The event host will call on each of the facilitators to present a summary of the "Top 4 Needs & Opportunities and Actions" from each of the four topic areas and the "Ideas for Support from CCCC"
- A note-taker will record the findings on a central flip chart visible to the full group.
- **Note:** *Pages with the four topic titles should be prepared in advance. There will likely be more than four top items when input from both groups is combined. Eliminate duplicates. Some of the results may be similar enough to combine across topics. (Four is not a magic number; it is fine for groups to choose more than four priority items. It comes down to whatever the group decides is realistic for implementation.)*
- **Note:** *Please set aside the input for CCCC and assign someone to send it to back to CCCC along with evaluation form(s)*

00:00-00:00 Break (10 Minutes) (10 min)

00:00-00:00 Implementation of Next Steps (Full group discussion) (40 min)

- Using the lists of action steps in each of the four areas, determine if there are participants who want to take the lead in coordinating an implementation process for specific areas of action. Depending on the item, implementation actions can include:

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- Convening a work group with other participants who want to be involved
- Initiating a work process within their organization
- Sending out a survey to gather additional needed information on the action
- Volunteering to add the item to the agenda of another related meeting
- **Note:** Use the "Action Plan" template for recording this information so that it can be shared with all participants after the meeting.
- If there is a shortage of people offering to help with follow-up, have the group go through another polling process to prioritize a total of three or four actions from all of the topic areas. (Have each person choose his or her top three or four. Then have a show of hands for each and go with the top vote-getters.) These items can then be used to focus the efforts of the coalition or others who will be doing follow-up. **The goal is to come away with at least a few concrete next steps with accountable parties and timeframes.**

00:00-00:00 Wrap-up (40")

- Thank you for your participation!
- We will be in touch
- Please complete an evaluation