

June 29, 2016

# Meaningful Consumer Engagement Webinar Series

## Consumer/Member Advisory Committees

### Recruiting, Training, and Retaining Members for Engagement



# Overview

- This is the first session of the “Meaningful Consumer Engagement Webinar Series.”
- Each session will be interactive (e.g., polls and interactive chat functions and time for questions at the end of the presentation), a 10 minute introduction, 60 minutes of presenter-led discussions followed by 20 minutes of presenter and participant discussion.
- Video replay and slide presentations are available after shortly each session at:  
<https://www.resourcesforintegratedcare.com/>

# Support Statement

- This webinar is supported through the Medicare-Medicaid Coordination Office (MMCO) in the Centers for Medicare & Medicaid Services (CMS) to ensure that beneficiaries enrolled in Medicare and Medicaid have access to seamless, high-quality health care that includes the full range of covered services in both programs. To support providers in their efforts to deliver more integrated, coordinated care to Medicare-Medicaid enrollees, MMCO is developing technical assistance and actionable tools based on successful innovations and care models, such as this webinar series.
- This webinar contains useful information for Medicaid MCOs, PIHPs, and PAHPs in meeting the member advisory committee requirements ( § 438.110) of the Medicaid managed care rule, as well as for MMPs in also meeting requirements in the three-way contracts.
- To learn more about current efforts and resources, visit Resources for Integrated Care at: <https://www.resourcesforintegratedcare.com/>

# Introductions



- **Rosa Palacios**, Moderator, Consumer Engagement Specialist, Community Catalyst



- **Jacqueline Dowdy**, MSW, Member Advocate, Neighborhood Health Plan of Rhode Island



- **Serena Simeone**, Consumer Member of the NHP-RI Member Advisory Committee (MAC)



- **Margo Michaels**, Director of Consumer Engagement, Health Care for All

# Webinar Outline/Agenda

- Meaningful Consumer Engagement
  - What is it? Why does it matter?
  - Consumer Engagement Toolkit and Technical Assistance
- Poll # 1 and 2
- Consumer Advisory Committees (CACs): Successful Strategies
  - Recruiting and Retaining Members to CACs
  - Consumer/Member Perspective
  - Training Members for CACs
- Polls # 3
- Q&A

# Meaningful Consumer Engagement

- “Meaningful” – Consumer Advisory Council meeting agenda; personal and representative stories; diversity; not tokenized
- “Consumer” – focus on member and caregiver input, not “member education” or staff presentations
- “Engagement” – active listening; feedback loop; input leads to systems change, improved outcomes

# Consumer Engagement Toolkit and Technical Assistance

- Toolkit to help health plans, provider groups, advocates, and consumers –  
[www.communitycatalyst.org/resources/tools/meaningful-consumer-engagement](http://www.communitycatalyst.org/resources/tools/meaningful-consumer-engagement)
  
- Technical Assistance and Consultative Services
  - Strategic Planning for Recruitment/Retention/Support
  - Consumer Training and Leadership Development
  - User-friendly Tools (invitation letters, flyers, activities)
  - On-site Assessment and Gap Analysis of engagement strategies

# Poll 1

**How would you best describe your professional area or the setting in which you work?**

- Health Plan Staff
- Healthcare Provider
- Consumer Advocate
- State, Local, or Government Official
- Community-Based Service Organization Staff
- Other



## Poll 2

**How do you recruit members for your Consumer Advisory Committee (CAC)? Select all that apply.**

- Telephone call outreach
- Referrals from member services and/or providers
- Referrals from care or service coordinators
- Referrals from consumer advocates and/or community leaders (civic or religious groups)
- Advertisement – website, member newsletter, flyers, etc.
- Health fairs or other community forums

# **Jacqueline Dowdy, MSW**

Member Advocate

Neighborhood Health Plan  
of Rhode Island



# Neighborhood Health Plan of RI: Neighborhood INTEGRITY

- Medicare and Medicaid Plan; MOU was signed on July 30, 2015
- Rhody Health Options - The Health Plan option
  - **Phase 1: UNITY – Medicaid managed long-term care**
    - Enrollment began October 1, 2013. Approximately 22,000 enrollees
    - Approximately 600 Medicaid-only
  - **Phase 2: INTEGRITY – Medicaid and Medicare**
    - Enrollment begins July 2016 thru March 2017; Anticipate over 11,000 enrollees
- Commitment to Consumer Engagement
  - Member Advisory Committees (MAC)
  - Dedicated staff to MACs

# Rhody Health Options/INTEGRITY: Member Advisory Committees (MAC) Overview

- Meetings will be held four times per year
- Stipend and meal provided; Transportation can be arranged, if necessary
- Structure/Composition:
  - Facilitated by Member Advocate and Manager of External Affairs
  - Current RHO Member Advisory Committee is a mirror of our current member population

# Rhody Health Options/INTEGRITY: MAC Recruitment

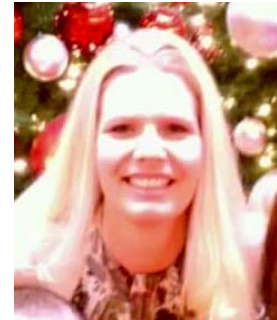
- Recruitment
  - Member Advocate – through member contacts
  - Community events
  - Referrals from advocates
  - Community partners and care managers
  - Ads in Neighborhood's quarterly newsletter
  - Word of mouth

# Rhody Health Options/INTEGRITY: MAC Retention

- Retention
  - Members are making contributions to a Health Plan
  - Members enjoy the connections they are able to build with other members
  - Meal and stipends
  - Members have developed close relationships with facilitators

## **Serena Simeone**

Consumer Member of the NHP-RI  
Member Advisory Committee (MAC)



# **Margo Michaels**

Director of Consumer Engagement  
Health Care for All





# Training Fosters Meaningful Engagement

- Orients consumers to each other, to the engagement process and to their delivery system
- Teaches beneficial skills
- Structures the dialogue around mutually set goals and interests
- End Result:
  - **Information + Skills + Goals = Success!**

# Curriculum Development

- What is important to include?
  - Key informant interviews
  - Expert review of outlines and content
  - Apply principles from toolkit
  
- Overarching philosophy
  - Focus on behavior, attitudes (and action)
  - Build confidence and team building
  - Nice to know vs. need to know
  - Participatory

# Curriculum Development: Objectives

- Explain the purpose of the state demonstrations to integrate services and supports for Medicare-Medicaid beneficiaries
- Describe the purpose of Consumer Advisory Councils (CACs) and their important role in shaping care for people in our community
- Discuss concerns and hopes about being part of the CAC

# Curriculum Development: Objectives

- State the purpose of CAC meetings
- Describe how CAC meetings work
- Identify key steps to prepare for meetings
- Distinguish effective CAC meetings and related activities from those that are less effective
- Name the key steps in the “feedback loop”

# Curriculum Development: Objectives

- Review effective qualities of a CAC member
- Distinguish between advocating for your own needs vs. those of your community
- Name the five most important skills of a CAC member
- Appraise your own strengths and challenges as a CAC member

# Examples of Activities

## SMALL GROUP ACTIVITY 3-3 MEANINGFUL AGENDAS OR NOT?

With your group, take a look at each of these agendas sent out in advance of a CAC meeting.

1. Do you think the Plan is seeking meaningful feedback or not at this meeting?
2. How would you suggest changing it before the meeting?

### AGENDA 1

1. Welcome
2. Review of Last Meeting and Follow up
3. Presentation by Dr. Brown: Consumer satisfaction with our plan
4. Discussion and action steps
5. Adjourn

### AGENDA 2

1. Lunch
2. Discussion
  - o Personal complaints and concerns
  - o Choice of colors for the new brochure
  - o Air conditioning in the vans
3. Discussion and action steps
4. Adjourn

### AGENDA 3

1. Welcome
2. Lunch
3. Presentation by Dr. Jones: How elderly people can eat right on a budget
4. Presentation by Dr. Smith: New Wheelchair Designs
5. Snacks and Discussion

### AGENDA 4

1. Welcome
2. Presentation by Dr. Brown: Quality Measures and consumer satisfaction
3. Presentation by Dr. Smith: Percentage of consumers who speak other languages
4. Presentation by Dr. Black: the success of the new exercise program
5. Any other concerns
6. Adjourn

## Additional Example

# How we get our needs met...

The van was 2 hours late in picking me up and now I can't see the doctor to get my medicine. I feel so angry. What should I do?



I wonder how many people miss their appointments because of transportation problems?



# Workshop Guide, Train-the-Trainer, and Delivery of Training

## Voices for Better Health Trainers Guide

## Voices for Better Health Workshop Guide Consumer Edition

*Preparing "Dual Eligible" Consumers to Serve on  
Consumer Advisory Councils/Committees*

OHIO, MAY 2015

### AGENDA

9:00	Introduction Icebreaker-Introductions and Ground Rules 11 things you need to know about our state project to improve care
10:30-10:45	Break
	Considering Myths What is consumer engagement Fears and Hopes
12:00	Lunch
12:45	What are the most challenging meeting behaviors? Video and Discussion My Role and What I Can Bring to the CAC
1:45-2:00	Break
	Eight things to know about CAC Meetings  Good communication at meetings
	Meaningful Agendas Role Plays
3:00	
3:45	Evaluation and Closing



# Consumer Feedback

I. Please tell us how well you can now...	Not Very Well	Well	Very Well
a. Explain the purpose of the state demonstrations to integrate services and supports for Medicare-Medicaid beneficiaries	1	5	2
b. Describe the purpose of Consumer Advisory Councils (CACs) and their important role in shaping care for people in our community	☹️	5	3
c. Feel like others share the concerns and hopes I have about being part of the CAC	☹️	6	2
d. Distinguish between advocating for my own needs vs those of my community	1	2	5
e. Explain effective qualities of a CAC member	☹️	4	4
f. Understand some of my own strengths and challenges as a CAC member	☹️	3	5
g. Show effective qualities of a CAC member	☹️	4	4

	Not Very Well	Well	Very well
How prepared do you now feel to be part of the CAC?	☹️	3	5

# Consumer Feedback

- **What part of this training did you find the most useful?**
  - Becoming Effective (Module #2)
  - Duties, skills, and members were detailed
  - All of it
  - How to be focused and respectful of other views
  - How we learn from each other
  - Purpose of meetings
  
- **What changes would you suggest to make the training more useful?**
  - None – Was well done and was very effective
  - None – Margo was an excellent presenter
  - N/A – Made it fun to learn

# Consumer Feedback

- **What other training programs do you feel are important for you as a CAC member?**
  - Not yet
  - Goal Setting
  - Any of the new programs
  - Getting to know others needs
  - Difference between waiver and non waiver program
- **Other comments**
  - *Well – worthwhile – learned a lot*

## Poll 3

**What new consumer engagement approaches do you now plan to use to improve your CAC onboarding process? Select all that apply.**

- Formal training curriculum
- Overview of plan benefits for health insurance literacy
- Development of ground rules for CAC action
- Skills for effective communication, representing others
- Sharing of personal stories
- None of the above

# QUESTIONS



# Survey

**Thank you for joining our webinar.**

Please take a moment and complete a brief survey  
on the quality of the webinar.