

**Question & Answer for Member Engagement Webinar 2**  
**Training Consumers for Engagement**  
**July 23, 2015**

**Speakers**

Margo Michaels, Health Action and Access Consulting

John Arnold, UHCAN Ohio

William Dean, Community Catalyst

**Q: You talked about meeting killers (e.g. bringing personal grievances, interrupting others who are speaking). How do you prevent these things from happening?**

A: John Arnold: The first thing you need to do is realize there are meeting killers that take place. You have to get the group to agree there are a number of areas that will make the meeting a success and delay the meeting. Once you list those meeting killers out, as I said in the presentation, it is up to the members themselves on the committee to manage the process and it will be even better if they have already selected a Chair. So it starts with the Chair. Then it falls to the other members to hold the other members accountable. Because remember, they agreed that moving forward this was the code of conduct they would adhere to. So it is going to be incumbent again on the members and the Chair to manage the process.

**Q: Do you have a training budget for the committee?**

A: Margo Michaels: We were able to get a site donated for this plan to host the training and the plan paid for lunch and breakfast.

William Dean: This was a pilot so we provided the training services without charge to the participating plans to work with us to determine if they were good activities, if it was going to be successful, and figure out ways we could tweak the training as well. So if you wanted to contact me I can let you know about what kind of pricing structures we could determine for training your advisory committee. If you were going to do it yourself, you could budget for, like Margo said, venue, transportation, refreshments, and obviously the staff time it takes to develop and facilitate the training.

**Q: How do you prevent your training session from becoming an actual consumer advisory committee meeting? Have you set rules that set the two apart?**

A: Margo Michaels: That is a great question. One of the very important things is to be very clear this is not a regular meeting. This is a special event. We set out ground rules at the beginning about what this meeting is and is not going to do, what this training is and is not going to do. And we also have a Parking Lot which is a very effective way of running meetings and trainings. There were issues that came up that really we could not address because it was really a part of a future discussion that needs to be at a consumer advisory committee meeting, not here. People understood that was needed. Sometimes we are able to come back to the content of the question. Sometimes people understood that the content was more

appropriately placed at a future consumer advisory committee meeting.

So setting those ground rules, using the Parking Lot concept in terms of expectations, needs to be pretty clear. We did not have full participation at the training. Some people thought it was a long day. Some people had problems with other appointments and issues. So that is obviously a barrier you want to try and prevent as much as you can in terms of getting full participation or reasonably full participation of the members there.

John Arnold: Let me add that the Parking Lot was very effective. After the meeting was over we went back over the Parking Lot issues. The Community Liaison that was there took notes and by the time we convened the meeting one month later she already had action plans and had discussion points as part of the agenda with the Chair to have it ready for discussion at the meeting. So definitely have a Parking Lot ready and let the members know they will be getting those addressed.

**Q: Could you talk more about building meaningful agendas on an ongoing basis so that members are providing meaningful input into important systems and quality issues?**

A: Margo Michaels: Sure. One of the things that we emphasized in the training was everyone's desire to have a meaningful engagement process and not to go to meetings for the sake of having meetings. I think it is a value everyone strongly agreed upon. When we did the activity around meaningful agendas the idea is not to just say, "Here is what a meaningful agenda looks like." Instead, we put together some strong agendas and some not-so-strong agendas and had people look at them and ask, "What makes it weak? What makes it strong? What would you do next time?" Through that activity we were able to help them define for themselves what they thought the criteria would be and how they would know if something was lousy or strong and what they could do about it.

One of the things that came up in the room was that the participants didn't think they had the ability to inform an agenda. One thing that came across was the idea of the feedback loop, and that we would have old business and new business discussed so we aren't just going to discuss something one meeting and then forget about it. So all of these things are values that I think we all know intuitively and that we can easily put into sort of a binder and say, "Look, here is what a meaningful agenda is," but my experience is that helping people come to those conclusions themselves and reflecting on it themselves can be actually more impactful. It also lets them set up a set of their own values and criteria as a group so that they can know moving forward "Hey wait, this agenda looks like there are five people talking at us for two hours and we have lunch. I don't think I want to go to a meeting like that and I don't understand how that is an opportunity for me to provide and our community to provide meaningful input into plan policies and procedures."

John Arnold: Also, if you do not have a Chair already selected by the committee members please select one. If not, select two or three people that will put together the agenda with input from the remaining committee members. That is how you are truly going to have buy-in

and commitment, because they feel now that they are trained and they know what an effective agenda looks like, you will get buy-in from them if they are putting together the agenda.

Margo Michaels: One more thing I want to add is that this is a pilot, and this is the first time these folks have been trained in these areas. I think that this training would be valuable for more experienced people or a mixed group but we also have ideas about doing a second-level of training once that initial socialization has happened and the initial successes are under their belt I think it is very appropriate for us to do additional training for them to gain more expertise and confidence in dealing with more complex issues. I don't think this is the only training they would get. I think they would love to see and that they would be interested in doing additional training that again would help push the envelope and help them push a little further around the things that are critical for their community.

**Q: How did you get consumers to agree to an all-day training?**

A: John Arnold: Well, it started with the relationship that the Community Liaison had with the members and because of HIPAA they couldn't give me telephone numbers but fortunately because I helped with the training and the recruitment we both were able to get on the phone and ask them if they wanted to participate. Most of them said yes right away. However, they may have had difficulty or they may have doubts or they may need to have their PCA, their Personal Care Assistant, come with them and that is why I said you have to build-in some flexibility in terms of the number of days you want to have it, the time and the length of time you have it. But once we got on the telephone and started having those discussions the majority of them had already said yes they wanted to participate in the training.

Margo Michaels: I also want to say we could have done many different models including doing two hours one night a week for a month, or some things on the phone using just a telephone, not a computer, and combining that with live sessions. So I think you do need to be flexible and obviously some people have full-time work and doing a full-day training is not possible, except we also were open to doing it on the weekends. I think the flexibility that John talked about is really critical.

**Q: After the initial training how often would you repeat a training session like this for an advisory committee?**

A: Margo Michaels: I would not repeat this training. I would use reinforcing training so that they can see what still remains to be a challenge and then also take them to the next level, level 2.0. I do think the training is just the beginning. I don't want to say training equals a successful community advisory committee. I think it is part of technical systems and support that you need to be thinking about on an ongoing basis for a committee like this. This training is one important step in that direction but not certainly a panacea.

John Arnold: I also would add that it is very important for the committee members that were

not able to attend, that they get the training. We are currently working with the plan to make that happen for the six members that were not able to attend as well as the other regions for the plan.

**Q: Did a diverse group of consumers participate or only the most high-functioning consumers?**

A: Margo Michaels: I think it was diverse. There were several people that had literacy issues. There were several people who had mobility issues. There was one blind person who was there. I think that for the most part we were able to because of the way we developed the training in terms of the participation and because we didn't want to rely on slides or use reading as the first and foremost thing one has to do to participate I think that all of them got something out of it. There was one gentleman, maybe John might say how he might have done, but I think it was a diverse group of people in terms of capabilities. John?

John Arnold: It was definitely a diverse group of people and the one gentleman Margo is speaking of there was an illiteracy issue. However, because we did not read verbatim or – because we did these activities he got a lot out of the training. So we were able to tailor it to meet his needs as well.

**Q: How long has the Consumer Advisory Council been meeting, and what is the retention rate?**

A: John Arnold: The plan that I am referring to, they have already had three meetings; the first one is when we talked about what the consumer advisory committee was all about. Then they had another one three months later. Then they had the training. Then 30 days later is when the next one convened. So right now to-date there have been three committee meetings with this particular plan. To answer your question in terms of retention, it has been between 13 and 15 members that would show up at every meeting. Remember, we recruited a total of 17 applications. Seventeen applications were received and we have the same group that has been showing up for the past three committee meetings.