



Recruiting, Refreshing, and Retaining Council Membership: Tips for Health Plans

Member engagement in plan governance plays a significant role in shaping the development and refinement of plan policies and procedures that address the needs, preferences, and values of members and their families and caregivers.¹ One of the ways health plans serving members dually eligible for Medicare and Medicaid have included members in plan governance is by establishing member advisory councils. This tip sheet highlights strategies that plans with member advisory councils may use to recruit new advisory council members and refresh council membership, as well as promising practices for retaining member advisors. This information reflects strategies and best practices shared by plans participating in Resources for Integrated Care's 2020 [Integrated Care Community of Practice](#) on member engagement in plan governance.

Recruiting New Member Advisors for Plan Governance

Member advisor recruitment is an on-going effort – members may complete their terms, experience changes in their health or family circumstances, or leave the member advisory council for other reasons. In addition, the accommodations plans have made to hold meetings that comport with COVID-19 social distancing protocols may present an opportunity to recruit advisory council members with transportation barriers, mobility issues, or other challenges that previously precluded member participation in plan governance. Promising recruitment strategies plans may consider include:

- **Developing a Comprehensive Application.** Applications allow plans to gather information about potential member advisors and can help plans recruit a diverse group of members for plan governance. Consider asking questions to gather basic demographic and background information, prior or current experience on other advisory councils, why the member wants to be on the committee, best times for their availability to attend meetings, and transportation or interpretation needs. With this information, plans can select members who complement the existing advisory council membership, will contribute to a diverse council, and provide the plan with a range of perspectives.
- **Casting a Wide Net.** Plans may consider using a range of methods (e.g., mail invitations, email invitations, calls) to invite a large sample of members who live within the council's geographic area to a scheduled meeting. The invitation can include an explanation of the advisory council, a proposed agenda, and contact information for the meeting organizers. Plans can use this strategy to identify

¹ Centers for Medicare & Medicaid Services. (n.d.). Person & Family Engagement Strategy: Sharing with Our Partners. Retrieved from <https://www.cms.gov/Medicare/Quality-Initiatives-Patient-Assessment-Instruments/QualityInitiativesGenInfo/Downloads/Person-and-Family-Engagement-Strategy-Summary.pdf>

members who are interested in joining the advisory council on a long-term basis from among the attendees.

- **Requesting Referrals.** Plans may request referrals for potential new member advisors from the care management team, which works closely with plan members and may know members who would be a good fit. Community organizations, such as adult day centers or assisted living communities, may also help identify members who would be good candidates for the council. Current advisory council members may also have friends or family who are plan members and want to participate in plan governance.
- **Conducting Community Outreach.** Community outreach events are also an opportunity to recruit new advisory council members. Prior to COVID-19 and its associated social distancing protocols, many plans were recruiting members at health fairs, food distribution events, or other opportunities where plan staff are able to interact face-to-face with members.

Recruiting Rural Members During a Time of Virtual Engagement

Some plans have found it easier to recruit members from urban areas with access to public transportation or shorter travel times. However, with the shift to virtual meetings during COVID-19, plans may have new opportunities to engage members living across their service areas, including in rural areas. Plans should assess whether their rural members have access to internet or devices that enable them to attend virtual meetings. If members do not have adequate technology to participate, consider providing or lending them devices, such as tablets (e.g., iPads), or providing them with WiFi devices that will allow them to connect to the internet. For more on engaging members virtually, read the [Engaging Members in Plan Governance During COVID-19: Tips for Health Plans](#) tip sheet.

Refreshing Council Membership

Refreshing council membership can help plans ensure new ideas and perspectives are brought to the group. However, plans can face challenges around refreshing membership, such as recognizing when there is a need to recruit new members for advisory committees, how to kindly rotate a member off the committee, or setting expectations in advance with committee members. Promising practices for refreshing council membership that plans may consider implementing include:

- **Establishing Term Limits.** Many plans choose to establish standard term limits for their advisory members. Term limits create clear expectations for members' expected service on the council. Standard term limits also allow plans to avoid potentially uncomfortable conversations with members who may want to stay on a council when the plan is recruiting new voices. Plans may have all advisors start and end their service at the same time, and then renew the council with completely new members. Alternatively, they can establish staggered terms, which would provide an opportunity to regularly refresh membership while providing continuity on the council. Typical term limits can range from two to three years. Setting term limits can be particularly helpful for plans that have a larger number of members who want to participate than the council can accommodate at any one time.
- **Closing and Reconstituting the Council.** Along similar lines of setting term limits, plans may also consider closing the existing council and recruiting new cohorts of members to participate in advisory council meetings. This may be of particular interest if the plan has not previously instituted term limits for council membership and would like to hear from new voices, or if the plan finds that competing personalities among committee members make it hard for the council to do its work. Plans will want to implement this

option with care to respect the relationships council members have built with the plan and to honor the time they have given to the council.

Retaining Members in Plan Governance

Consistent member participation in plan governance is an important part of plans' ongoing collection of member feedback to help inform plan operations and policies to meet member needs. Plans can promote member retention in plan governance through advisory committee meeting design and management. Plans may consider the following strategies for ensuring positive meeting experiences for members, showing appreciation for members' time and feedback, and offering supports and trainings:

- **Ensuring Positive Meeting Experiences for Members**
 - **Carefully Consider Meeting Logistics.** Choose meeting locations that members know and that are convenient for members to get to, such as local community centers. It is also important to identify meeting times that are convenient for members. Consider holding joint meetings in multiple languages to encourage attendance from members representing diverse populations. Plans may also continue to offer virtual meeting options for members who face barriers to in-person participation once the COVID-19 social distancing protocols are no longer necessary.
 - **Build Member-Driven Agendas.** Building agendas that reflect items the members want to discuss reinforces that the meeting and committee belong to the members. If plans conduct reminder phone calls to ensure members are aware of an upcoming meeting, they may also use this phone call as an opportunity to request any agenda items the member would like to raise during the meeting.
 - **Design Easy-to-Understand Meeting Materials.** Develop materials, including agendas and slide decks, that use plain language and are inviting and easy for member participants to understand.
- **Showing Appreciation for Members' Time and Feedback**
 - **Offer Stipends or Incentives.** One way plans can encourage retention is by demonstrating their appreciation for the time members spend attending meetings. Offering stipends or incentives – culturally relevant foods, items, and gift cards – can support and encourage continued member participation. For more on approaches to stipends and incentives, see the [Encouraging Member Participation in Governance: Innovative Stipends and Incentives](#) tip sheet.
 - **Implement Feedback Loops.** Members are more likely to participate regularly if plans demonstrate that they seriously consider member feedback and this feedback has an impact on plan policy. Ensure that agendas include updates on previous feedback and the status of any changes – if the plan is unable to make a change, explain the rationale briefly.
- **Providing Supports and Trainings**
 - **Conduct Onboarding and Establish a Buddy System.** To ensure that new members can fully participate in the council, plans may want to offer an onboarding session for new members. During this initial training, members may learn about how the plan uses council feedback, what kind of problems or initiatives the council has advised on in the past, and changes the plan has made as a result of the council's work. Members can also meet plan leaders and receive an overview of council meeting expectations and logistics. If your council structure includes staggered membership terms, match newer members with longer-term members who can serve as a mentor. This can help new participants feel comfortable during the transition into their role on the committee.

- **Provide Ongoing Training.** Plans may consider providing ongoing training to advisory council participants to help members feel comfortable providing feedback and participating in meetings. Training may include reviewing meeting rules to help members understand how to be effective participants, such as: 1) avoiding side conversations; 2) turning off cellphones or other distractions; and 3) being respectful of other participating members and health plan staff.
- **Troubleshoot Problems and Provide Health Education.** Helping council members manage their own health may provide plans with additional insights on barriers all members experience navigating plan processes while solving council members' problems and building trust with plan staff. Plans can also support members by providing health education during council meetings, such as raising awareness about how to access flu shots and other preventive services.
- **Offer Technological Support.** If members are joining meetings virtually, ensure there is sufficient technological support. Plans may consider assigning a staff member as a dedicated troubleshooter for meetings and allowing extra time for addressing any technological challenges that arise as members join the meeting.

Spotlight on UnitedHealthcare Community Plan of Massachusetts

UnitedHealthcare Community Plan of Massachusetts holds Member Advisory Committee meetings in a central location, with additional off-cycle member engagement town halls in different locations. A town hall meeting allows the plan to hear from a large, diverse group of members. UnitedHealthcare Community Plan uses survey feedback as part of their town hall planning – through the survey, they identify geographic areas with concentrated groups of members reporting lower satisfaction levels with their health plan and benefits; survey results may also flag concerns for members of a specific racial group, ethnicity, or nationality. This strategy helps the plan target specific members to elicit their feedback and learn more about their needs. The plan typically coordinates free transportation and offers mileage reimbursement to encourage attendance at in-person meetings, and has begun providing gift cards for local grocery stores to promote member participation in virtual meetings.

Additional Resources

The following Resource for Integrated Care products provide additional information for health plans looking for member recruitment strategies and promising practices for refreshing and retaining council membership.

[▶ Engaging Members In Plan Governance During COVID-19: A Panel Discussion \(2020\)](#)

This webinar features promising practices from three health plans for staying connected to member advisors and supporting their continued involvement during COVID-19.

[▶ Member Engagement In Plan Governance Webinar Series \(2019\)](#)

This 2019 webinar series focuses on how health plans engage members in plan governance through consumer advisory committees or other strategies. The series features webinars on successfully engaging members in plan governance, recruiting members and supporting participation in plan governance, and gathering and using member feedback in plan governance.

[Listening To The Voices of Dually Eligible Beneficiaries: Successful Member Advisory Councils](#)

This video features interviews with members, a caregiver, health plan staff, and health plan executive leadership sharing their perspectives on successful member advisory councils. It includes recruitment strategies and member supports to encourage retention in advisory councils.

[Encouraging Member Participation in Governance: Innovative Stipends and Incentives](#)

This tip sheet, for health plans serving individuals dually eligible for Medicare and Medicaid, highlights approaches to stipends and incentives to support member participation in plan governance.

[Engaging Members in Plan Governance During COVID-19: Tips for Health Plans](#)

This tip sheet, for health plans serving individuals dually eligible for Medicare and Medicaid, highlights promising practices for engaging members in plan governance during COVID-19.

The Medicare-Medicaid Coordination Office (MMCO) in the Centers for Medicare & Medicaid Services (CMS) seeks to help beneficiaries dually eligible for Medicare and Medicaid have access to seamless, high-quality health care that includes the full range of covered services in both programs. This tip sheet is intended to support health plans and providers in integrating and coordinating care for dually eligible beneficiaries. It does not convey current or anticipated health plan or provider requirements. For additional information, please go to <https://www.resourcesforintegratedcare.com/>. Please submit feedback to RIC@lewin.com.