The Community Engagement Toolkit Companion Guide

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The Community Engagement Toolkit Companion Guide
Module 1 - Getting Started

Module - Getting Started

- Chapter 1.1 - Building a Leadership Team

According to Marshall Ganz[5], community engagement requires a leader, who is willing to step out and help guide and motivate their community to create change.

This requires that a leader who can:

- Share the story of why they were called to lead, the story of those they hope to engage, and their collective story of action.
- Build intentional relationships and recruit a team with a shared purpose, shared goals, and a shared agenda.
- Recruit funders who can help convert their resources to power and their strategy to positive and measurable action.[6]

Module 1 - Getting Started

Goal:

To help you assemble a leadership team, determine your area of focus, identify a preliminary set of goals and hold your initial convening.

C-TAC
COALITION TO TRANSFORM ADVANCED CARE

BRIDGE BUILDER STRATEGIES

Module 1 - Getting Started

- Building the Team

Once leadership has been identified, the next step is to identify and recruit a small group of two to five people who are willing to come alongside and help lead the effort as a leadership team, and who are involved in advanced illness. This group may include:

- Health insurance companies, health systems, and physician organizations.
- Palliative care, and hospice providers.
- Representatives from patient advocacy organizations.
- Organizations interested in aging.
- State health associations, state government, government advisory councils, and quality improvement groups.
- The faith-based community.
- It is recommended that you include a person with an advanced illness and a family member or caregiver in the group

Module 1 - Getting Started

- Leadership Models

Effective leadership models include:

- Shared responsibility and mutual accountability for a common goal.
- Use of ground rules adopted by all participants.
- Listening empathically to community members' personal experiences.
- Diversity that reflects the community's culture, norms, and values.
- Awareness of related work in the community by coalitions and partnerships.

Module 1 - Getting Started

- **Bringing People Together**

After you have gained commitments from those who have been invited to help lead the effort, you will want to bring the group together to determine where you would like to focus. In helping reshape and reorient advanced illness care, you may seek to encourage patients to share their stories.

Module 1 - Getting Started

STOP

You have completed Chapter 1.1 Module 1 of the C-TAC Toolkit.

Please complete the exercises in your C-TAC Toolkit Companion Guide before continuing Module 1.

Module 1 - Getting Started

- Chapter 1.2 - Goals, Focus, and Value Propositions

- **Goals**:
    - o Validate that the group is action-oriented.
    - o Provide a suggested map for their work.

- **Focus:**

    - o Determines where and among whom you can have the greatest impact

- **Value Proposition:**
    - o Describes the value of the work.
    - o Connects the work to interested stakeholders, including funders.

Module 1 - Getting Started

- Chapter 1.2 - Goals, Focus, and Value Propositions

The process to develop the goals, focus and a value proposition begins with:

- Describing the group's connection to the effort.

- Determining what the group members do professionally.

- Understanding family connections to advanced illness.

- Identify efforts already underway with other groups.

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COALITION TO TRANSFORM ADVANCED CARE

BRIDGE BUILDER
STRATEGIES

Module 1 - Getting Started

- ## Chapter 1.2 - Goals, Focus, and Value Propositions

Our goals, focus, and value proposition are best described and developed by answering a series of questions:

- What we hope to achieve?
- What is the strategic focus and scope?
- What roles we want people to play?
- What are the ways to potentially tackle the opportunity?

Sharing Our Stories of Passion and Interest to Build Consensus

As you develop your goals, an important question the leadership group needs to discuss is what it would like to accomplish over time. Use the Reflection Questions in the Companion Guide as a guide.

Module 1 - Getting Started

- Chapter 1.2 - Goals, Focus, and Value Propositions

Developing Your Goals

In getting started, the leadership team created an initial list of goals. While this is a great starting point, the list that has been created is likely too narrow to allow for maximum impact and engagement from the community. As you go through the process described here, it is best to include a larger group.

- The Present/Future Grid

- The Logic Model

- Journey Narrative

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- Chapter 1.2 - Goals, Focus, and Value Propositions

The Present/Future Grid
An important tool in helping identify clear goals is Present/Future grid. It is useful in that it describes the Present situation for those with an advanced illness, and the ideal 'Future,' based on changes the group wishes to bring about.

- Follow along in the Companion Guide through the exercises with the Present/Future Grid.

- Use the Present/Future template found in Module 4 to complete the Present side and then the Future side of the grid.

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- Chapter 1.2 - Goals, Focus, and Value Propositions

The Present/Future Grid

Please complete the Present/Future Grid in your C-TAC Toolkit Companion Guide before continuing Module 1.

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- Chapter 1.2 - Goals, Focus, and Value Propositions

Logic Models and Goal Setting
A Logic Model is another tool that can help determine your group's final set of goals. The Logic Model was first developed to help assess program effectiveness.[15]

- Follow along in the Companion Guide through the exercises with the Logic Model.

The Logic Model is completed left to right and begins with the resources needed rather than goals. This approach limits your goals to only those things that you already have resources to achieve. Because you want to let your goals guide what you do, the model is flipped to begin with goals and end with resources. You will ultimately complete all four columns in the Logic Model.

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- Chapter 1.2 - Goals, Focus, and Value Propositions

THE C-TAC State Index

Additional tools will be used to refine and evolve both our Present/Future grid and our initial set of goals. The C-TAC State Index will include a series of measures that describe the current situation.

These measures, which rely on data from publicly reported sources, available at the state level and can be used to assess the quality and comprehensiveness of the system of care. Data described in the state measures may not be available locally; however, they may suggest areas that should be examined more closely. With this in mind, it is useful to consider your initial list of goals and determine if any changes are necessary.

Module 1 - Getting Started

- Chapter 1.2 - Goals, Focus, and Value Propositions

The Logic Model and Goal Setting

Please complete the Logic Model in your C-TAC Toolkit Companion Guide before continuing Module 1.

Module 1 - Getting Started

- ## Chapter 1.2 - Goals, Focus, and Value Propositions

Journey Maps

Another important tool which can help you refine your goals and plan further is the journey map. The initial goal in using it here to understand the needs of the person with an advanced illness between the time of their diagnosis and death.

Step 1: Use the Present/Future grid and determine the significant decision points.

- Diagnosis
- Developing a care plan
- Initial Treatment
- Treatment failures
- Palliative Care
- Forgoing further treatment
- Hospice

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- Chapter 1.2 - Goals, Focus, and Value Propositions

Journey Maps

Step 2: Use the decision points sown in the Companion Guide to divide the journey of the diagnosis of advanced illness and death into distinct chapters.

- Who is involved in the decision-making process?

- Where they found information to inform their choices?

- What are the needs of other decision makers and key questions they may raise?

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- ## Chapter 1.2 - Goals, Focus, and Value Propositions

Journey Maps

Step 3: Use the Present/Future grid and other information you have generated to:

- Who is involved in the decision-making process?

- Create a brief vignette that describes: the person, the decision, the emotions, and the patient's values and beliefs.

- Personalize it and include details that allow you to visualize the person and the situation.

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- ## Chapter 1.2 - Goals, Focus, and Value Propositions

Journey Maps

Example:
Edna is a 72-year-old woman, who has been diagnosed with stage 3 metastatic breast cancer. She is divorced but remains close to her ex-husband, who is also experiencing health issues. Their daughter and her family do all they can to provide support. Edna's prognosis is not good, yet she remains active, in addition to following the directions provided by her doctor. She would like to know more about the resources that she has available to her and to join a support group, but she is not sure where to find them.

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- Chapter 1.2 - Goals, Focus, and Value Propositions

The Journey Narrative

Please complete the Reflection Questions and the Journey Narrative in your C-TAC Toolkit Companion Guide before continuing Module 1.

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- Chapter 1.2 - Goals, Focus, and Value Propositions

Defining Your Focus

Now, with your Journey Map complete, it's time to determine where you want to focus. While your Journey Map may describe the full-care continuum, you must decide if you are going to focus on:

- Areas that you can impact.

- Specific set of stakeholders.

- Specific geographic regions.

- Timepoints in a person's illness.

Use the Reflection Questions in the Companion Guide to help you to determine your focus.

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- Chapter 1.2 - Goals, Focus, and Value Propositions

Creating Your Value Proposition

Few donors are willing to invest time, energy, or money in any cause unless they have a clear understanding of the impact of their efforts. Developing a strong, convincing Value Proposition for your organization or cause is the first step to mapping out a successful development campaign.

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- Chapter 1.2 - Goals, Focus, and Value Propositions

What is a Value Proposition?
A Value Proposition describes the exclusive, continuous value your donors will gain by supporting your cause. It answers the questions:

- What makes your cause unique and worthy of support?

- How is aligning with your group/coalition beneficial for patients and families?

- How is aligning with your group/coalition beneficial for the community?

- How is aligning with your group/coalition beneficial for your prospective donors (either individuals or businesses)?

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- ## Chapter 1.2 - Goals, Focus, and Value Propositions

A Compelling Value Proposition

- Sets your organization apart in a competitive market.

- Persuades prospective donors to invest in your worthy cause.

- How is aligning with your group/coalition beneficial for the community?

- Explains how prospective donor sponsorship:
    - Will make a difference.
    - Bring a benefit,
    - Create an opportunity that they won't find elsewhere.

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- Chapter 1.2 - Goals, Focus, and Value Propositions

Creating Your Value Proposition

Know your target audience.

- Identify all possible sources of support, including key decision-makers.

- Perform careful research to create a detailed persona of your ideal supporters.

- Use interviews and surveys to identify your prospects' demographics, motivations, and attitudes.

- Use this information to highlight the aspects of your organization that will most resonate with them.

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- Chapter 1.2 - Goals, Focus, and Value Propositions

Creating Your Value Proposition

Analyze your current situation.

- Refer to the Companion Guide regarding use of the SWOT Analysis and PESTLE Analysis

- Clearly define your group/coalition's values, mission, structure, and systems. Are they cohesive in their purpose and function? Do they send a message that's consistent with your cause?

- Pinpoint your group/coalition's strengths (what you do well) and weaknesses (what needs work or reevaluation).

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- Chapter 1.2 - Goals, Focus, and Value Propositions

Creating Your Value Proposition

Analyze your current situation.

- Identify any social, economic, or political factors that can affect your group/coalition, such as community demographics, legal guidelines, or controversial viewpoints.
- Compare and understand your group/coalition's position relative to competing non-profits:
  - What sets your cause apart from that of other similarly minded organizations?
  - How does their work affect their communities?
  - What do their supporters like most about their work?
  - How well do they communicate the benefits of their work to their supporters?

Module 1 - Getting Started

- ## Chapter 1.2 - Goals, Focus, and Value Propositions

Writing Your Value Proposition
Once you've determined where you want to go and how well-prepared you are to get there, you can shape a powerful message to attract the right supporters. Your Value Proposition should paint a clear, compelling picture of:

- Who you are?

- What significant work you are doing?

- Why prospective donors should support your cause?

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- ## Chapter 1.2 - Goals, Focus, and Value Propositions

Writing Your Value Proposition

Examples:

"Stand Up to Cancer was created to accelerate groundbreaking cancer research that will get promising new cancer treatments to patients quickly. We won't stop until every cancer patient is a long-term cancer survivor."

Standup Up to Cancer works relentlessly to offer the newest, most effective, and most promising cancer treatments to patients quickly by bringing together the best minds to collaborate, innovate, and share cancer research.

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- Chapter 1.2 - Goals, Focus, and Value Propositions

Writing Your Value Proposition

Examples:
"To transform the landscape of dementia forever. Until the day we find a cure, we will strive to create a society where those affected by dementia are supported and accepted, able to live in their community without fear or prejudice."

The Alzheimer Society believes passionately that life doesn't end when dementia begins.

Module 1 - Getting Started

- ## Chapter 1.2 - Goals, Focus, and Value Propositions

The Value Proposition

Please complete the Reflection Questions and the Value Proposition in your C-TAC Toolkit Companion Guide before continuing Module 1.

Module 1 - Getting Started

- Chapter 1.2 - Goals, Focus, and Value Propositions

The Convening
Before You Meet

- Generate a list of individuals you would like to involve from the community A Community Contact template is available in Module 4 to help facilitate this step.

Module 1 - Getting Started

- ## Chapter 1.2 - Goals, Focus, and Value Propositions

The Convening
Before You Meet

- Plan a community convening, where you can discuss the issue, the group's interests, and preliminary things that you and the group hope to achieve. A Convening Checklist can be found in Module 4. It will ensure you have covered all of the key items in your planning. An important consideration in planning the convening is finding a location that is easy to get to, and that has convenient parking.

Module 1 - Getting Started

- Chapter 1.2 - Goals, Focus, and Value Propositions

The Convening

Before You Meet
When identifying a date, consider the following:
Provide 6-8 weeks lead time. This is especially true if you are asking senior leaders in the community to be involved.

- The meeting should be planned for either first thing in the morning or at the end of the day. For healthcare providers, the end of the day is best, given their schedules.

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The Convening

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The Convening

Before You Meet

Divide the list of desired attendees with those you wish to involve amongst the leadership group and then reach out to each person. It is best that each of the leadership group have:

- The vital facts that can be shared by phone and in a follow-up email.
- What the effort is?
- Why it is needed?
- What they can contribute?
- Ask for them to invite another who the believe need to be involved.

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- ## Chapter 1.2 - Goals, Focus, and Value Propositions

The Convening

During the Event

- Name tags and name tents should be available to help make it easier for those who have not yet met one another.

- Print the agenda and a copy of the goals to demonstrate that the effort is well organized.

- Collect contact information that can be shared with all of the other members.

- Limit introductions to name and organization to maximize your time.

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- ## Chapter 1.2 - Goals, Focus, and Value Propositions

The Convening

During the Event

- Share the goals of the coalition as well as the value proposition and get buy in from everyone who attends.

- Have flipcharts on hand to capture input.

- Generate the names of other people that should be involved.

- Determine key steps that should be taken and a timeline for doing so.

Module 1 - Getting Started

- ## Chapter 1.2 - Goals, Focus, and Value Propositions

The Convening

After the Event
Leadership Team members will want to quickly and intentionally follow-up with event participants.

- The group can send out handwritten "Thank You" cards to participants.

- A drafted email can be sent thanking participant for coming is also beneficial.

- Along with the email, you can attach the minutes from the event and participant contact information.

- Also include the date, time, and location of the group's next convening.

Module 1 - Getting Started

- Chapter 1.2 - Goals, Focus, and Value Propositions

Stop the video and review the Chapter 1.2 Summary.
Take time to answer the previous questions and begin to complete the listed Action Steps.