The Conversation Project
Making a Difference in Your Community: Tracking your Influence and Impact
May 16, 2018
Patty Webster
Naomi Fedna
Welcome to today’s session!

Please use Chat to “All Participants” for questions

For technology issues only, please Chat to “Host”

WebEx Technical Support: 866-569-3239

Dial-in Info: Audio / Audio Conference (in menu)

Raise your hand

Select Chat recipient

Enter Text
Ice Breaker Question

Type into the chat box your response to the following question:

*How did you learn about this call?*

Make sure you send your message to “All Participants.”
Where are you located on the map?
Agenda

- Why tracking/measurement matters
- Community highlight and Q&A
- Group discussion
- Tools / resources from TCP
- Get your feedback and questions
- What else?
Recap: Design questions

- Who (what audience) do you want to reach and what do you want to support them to accomplish?
- What do you want to accomplish?
  - What would make you proud?
  - What would success look like to you and your community?
- What do you need to do to get there?
  - What activities/key ingredients will you need to accomplish what you are working towards?
- How will you know if you’ve reached what you set out to accomplish?
  - What can you keep track of that will tell you you’ve reached your ultimate goal?
Why does tracking matter?

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In just 6 months, we’ve reached over 300 members of our community of 2,500 through 20 workshops and 1 sermon on the importance of advanced care planning conversations with loved ones. Evaluations showed that 25 of these members have already had conversations and documented their wishes. Participants said: "The fact that you encourage us to talk about and fill out our wishes NOW, provide the paperwork and a follow-up date to witness the AHCD...is such a great technique. You make it so easy." "You are preventing so much suffering for so many people." "You’re addressing a need to communicate with my family."
Why does tracking matter?

1) Helps you tell your story.....better!

2) Combines head and heart: evidence AND stories for compelling case and impact story (who and how)

3) Shows what you are doing is working (or not)!
   - Is this tactic (event/activity) influencing the outcome (what) we hope to achieve?
   - Is it helping us use our resources effectively?
   - Will it help us build more organizational capacity?
   - Will it help develop leadership?
Who does tracking matter for?

For yourself
- Helps you understand and measure your progress
- Determine best use of your resources, your expertise and time
- Helps identify where you may need others’ help!

For others
- **Pull**: draws in additional community members
- **Push**: Pitch for funders, media, partners

For TCP and wider ACP community as a collective
- See the changes in cultural shift we all seek to attain
“There is joy in work. There is no happiness except in the realization that we have accomplished something.”

— Henry Ford
St. John the Evangelist
Roman Catholic Church
Columbia, MD

Audrey Marsh, Ministry Lead for "The Gift of Peace"
Background

- Founded in 1967, we are a Catholic congregation that provides Masses for a very diverse congregation of about 3000. Columbia was intentionally planned to be economically, socially, culturally and racially diverse.
- Team: Engineer/manager (team lead), a former priest, a Resurrection Ministry lead, a lawyer trained in Grief Ministry and a nurse.
- A local foundation, established to promote health and wellness (Horizon Foundation) established a one year pilot with churches and health organizations
- IHI partnered with Horizon for the pilot year.
Aim

Initial goal:

- The SJERC team will seek to educate at least 100 fellow parishioners about medical, legal, ethical, emotional and spiritual EOL issues and will encourage member participation in the Conversation Project. Focusing on EOL as a physical and spiritual reality, we will encourage the SJERC Community to communicate with family and/or friends about their personal EOL wishes and to identify an individual to serve as their designated health care agent by the end of the pilot (Sep 2016-Jun 2017).
*Measurement*

- Tracked the number or people attending our workshops and panels.
- Sent a follow-up email and provided the option of anonymous response cards at Masses (one full month after all program sessions) with the following simple check boxes.
  - I had the conversation
  - I’ve named a health agent
  - I plan to have the conversation
  - I plan to name a health agent
  - I do not plan to have the conversation
  - I do not plan to name a health agent
- Analyzed written feedback forms from each workshop and panel to measure needs for improvement.
Feedback Form

The Gift of Peace
Conversation Project Workshop Evaluation

We value your feedback about this workshop experience. It will serve to guide us as we continue developing this program. Kindly take a few minutes to answer the following three short questions. Thank you so much for your thoughtful response.

1. What is one idea or insight from this workshop that is personally meaningful for you?

2. What aspect of the workshop did you like the best?

3. In what ways can this workshop experience be improved?
Learning

- Before Sabbath Sunday initiation to the parish, attempts to run pilot groups to test our presentation skills and content failed using already established parish groups. Discovered the importance of being tied into parish processes and hierarchy. This is critical.

- Switched to a one on one approach for recruiting a testing bunch and asked the “Marriage Encounter” group to help us out (they have been together for 25 years and have monthly speakers) They agreed, provided valuable feedback that resulted in our redesigning our presentations.

- Researched additional speakers for panels by attending a variety of presentations and hand picking our speakers. Adjusted timing based on what was observed at other panels.

- Used feedback recommendations for topics the following year.
**Larger Impact**

- Verbal feedback has been extensive: Attendees we don’t know approach us and ask:
  - “What is next?”
  - “I missed one, will it be repeated?”
  - “This was amazing, so happy I came.”
  - “Any chance you video’d the panels so I can see what I missed. (we video’d all but the actual workshops for two years, and they are available in our interfaith library. People are checking them out routinely.

- Feedback from presenters: “We will come back any time you like. “

- Requests from other presenters to be included next year.

- Overwhelming approval to sustain the program for the future.
Lessons/challenges/words of wisdom

Lessons:
- We learned how key, in a faith setting, buy in from clergy is paramount.
- Planning and practice really paid off.

Challenges:
- We also learned that some of the biggest obstacles can be administrative, if you are not familiar with the inner processes and politics of the parish itself.

Words of Wisdom - Celebrate:
- We celebrate our clergy: their involvement and passion for this effort was key to success. Their recorded homilies are already being shared with other Catholic Congregations.
- We celebrate our congregation: People embraced the workshops and panels. They requested more for the next year and again this year.
- We celebrate personally: Truly blessed to be in this parish and our efforts so appreciated. Our team is known throughout the parish, and singled out routinely for thank you’s from clergy, staff and parishioners.
- One parishioner donated money for continuation of the program in memory of her husband, whom she said was the ultimate planner.
Celebrate: Favorite Feedback

“Keep as is. Can’t think of any improvement except next time, invite the Pope! Great program.”

“Thank you for bringing this dialogue to our congregation. It is timely and extremely worthwhile.”

“This three part series has been very helpful to me and my family. Thank you!”

“Dying is so complex... “wow.”

“I liked having extra copies of the workbook for my family.”

“I have thought extensively about death and after, but not so much about dying.

“This answers a real need. One ‘thank you’ is hardly enough.”
Questions?
How are you tracking activities and actions?
TCP tool: Activity, Action and Learning Tracker
TCP Community Goal: 750,000 Episodes of Engagement in 2018

GOAL: 550,000 episodes

PRIMARY (via TCP staff)
- Face-to-face engagements
- Website content
- Social media content
- Starter kit sharing
- Newsletter content

GOAL: 200,000 episodes

SECONDARY (via community partners)
- Attendees at events
- Newsletter/email content
- Starter kit sharing
- Social media
Event specific collection methods

- **Sign-in sheets** (paper-based, text...e.g. Textiful)
- **Event SMS polling** (Simpletexting, SMS poll, poll everywhere, etc.)
- **End-of-event evaluations** (paper, web-based, text)
  - Intentions / commitment to action
  - Qualitative Feedback
What event-specific collection methods are you using?
Post-event specific collection methods

- **Post-event evaluations**
  - Email survey monkey (5-week post event)
  - Collect at beginning of 2nd session
  - Follow-up calls

- **Be creative – ask participants to co-design**
  - Conversation and/or action marbles in a jar at church
Group/partner specific collection methods

- Shared Google doc
- Monthly Google form/survey monkey
Group/partner specific collection methods

East Bay Advance Care Planning Coalition

MAIL OR FAX FORM TO:
Alameda-Contra Costa Medical Association
6230 Claremont Avenue
Oakland, CA 94618

Email: accma@acmca.org
TEL: (510) 654-5383
FAX: (510) 654-8959

Date of event_____________________________________

Speaker Name_____________________________________

Email address_____________________________________

Address___________________________________________

Telephone_________________________________________

Type of event: Champion Presentation  Coaching Presentation (circle one)

“Champion” presentation to present the concepts and goals of advance care planning

“Coach” presentation to assist attendees in engaging in “the conversation” to complete the advance care planning process

Organization through which you received the request to make the presentation:

___________________________________________________________________________

Sponsoring group for the presentation (if applicable):________________________________

Location for event______________________________________________________________

County_______________________________________________________________

Number of participants/attendees:__________________________

Type of attendees: General public; civic group; faith-based group; seniors; health care providers; other
Resources on TCP website

- Available on our Community Resource Center
  - [http://theconversationproject.org/resources/](http://theconversationproject.org/resources/)
  - “Measurement” and “Evaluation and tracking” categories
Tracking tools to share? Methods used to track?

Email: pwebster@ihi.org
Upcoming: Community Calls

<table>
<thead>
<tr>
<th>Date and Time</th>
<th>Topic</th>
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<tbody>
<tr>
<td>Wednesday, June 20th, 3:00 – 4:00 pm ET</td>
<td>Community Planning 101</td>
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<tr>
<td>Wednesday, July 18th, 3:00 – 4:00 pm ET</td>
<td>Community Planning 201: Next steps for spreading, sustaining/keeping interest</td>
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<tr>
<td>Wednesday, August 15th, 3:00-4:00 pm ET</td>
<td>Special Interest: Conversation Sabbath</td>
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<tr>
<td>Wednesday, September 19th, 3:00-4:30 pm ET</td>
<td>Virtual Speaker Training</td>
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Upcoming: Conversation Sabbath 2018

conversation sabbath

Oct. 26 – Nov. 4 | #ConvoSabbath
We want your feedback!

After this call you will be redirected to a Survey Monkey form

Please take a few moments to answer the following questions:

– How useful was this session on a scale from 1-5?
– Given today’s topic, what would you like to learn more about?
– Any other comments on today's session?
Questions?