

the conversation project



Messaging That Matters: Shaping Health Tools with Purpose and Clarity

Kate DeBartolo
Shubhi Tandon
October 22, 2025

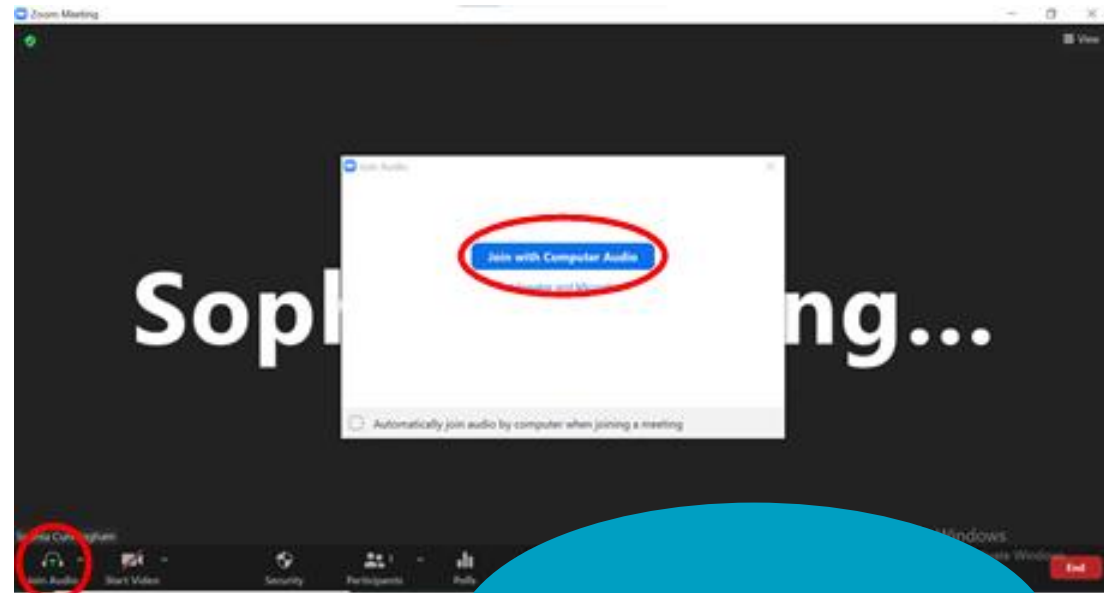
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Connecting your Audio

If this is your first time using Zoom, a “Join Audio” box may pop up when you join the meeting.

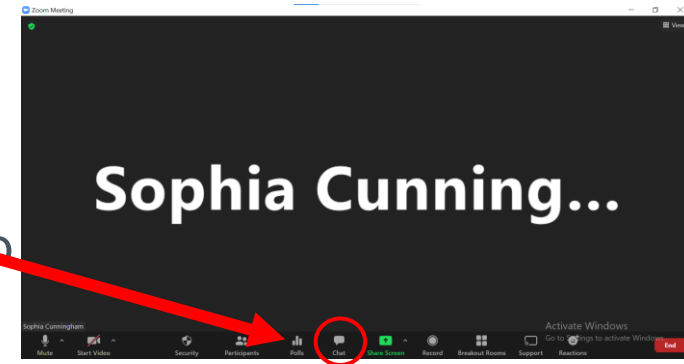
We recommend you join using computer audio.



Tip: Use a headset to improve sound quality

Chat Panel

Click the Chat button at the bottom of the screen to



Type your message in the field at the bottom of the side bar

Make sure you're sending to "Everyone" or to the

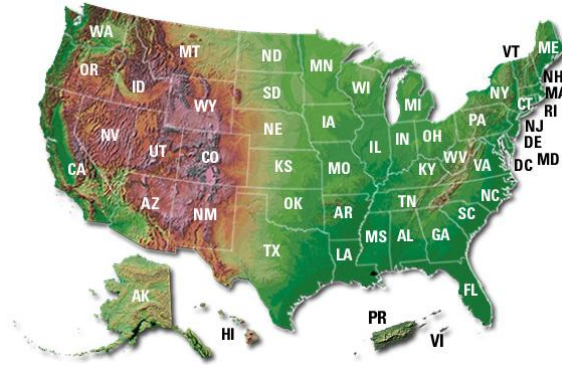


Intros/chat

Type into the chat box:

Your **name, location, organization**

and if you are **new** to The Conversation Project or **seasoned**?



Make sure you send your message to

“Everyone.”

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On today's call



Patty Webster
Improvement Advisor,
Community Engagement



Shubhi Tandon
Project Manager



Erik Fromme, MD, MCR, FAAHPM
Senior Scientist/Lead Faculty,
Serious Illness Care Program,
Ariadne Labs, Brigham and
Women's Hospital, Harvard T.H.
Chan School of Public Health



Kate DeBartolo
Senior Project Director



Agenda

Welcome, review and connections

What Matters to Me Workbook, My Health Checklist and messaging principles: Dr. Erik Fromme and Kate DeBartolo

Q&A and discussion

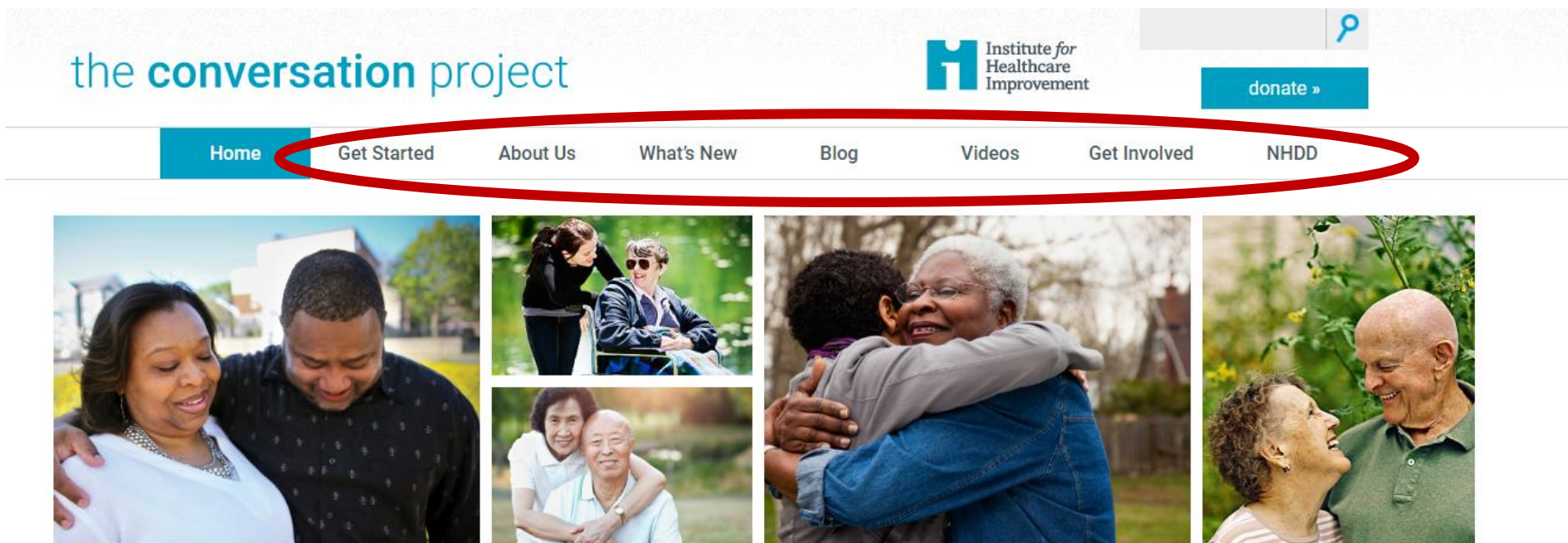
Wrap up and leaving in action

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**Helping people share
their wishes for care
through the end of life.**

Our website



Helping people share their wishes for care through the end of life.

<https://theconversationproject.org/>

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One request...if sharing TCP resources/messaging



Please keep eye on email/newsletter and share how many you are reaching in our **Community Activity Survey!** Collected 3 times per year.

Our continued funding for FREE resources depends on it!

Next survey January 2026

<http://forms.ihl.org/the-conversation-project-email-sign-up>



New blogs/updated guidance

On our Blog tab,
“What’s new” tab

Blog

Talking About Death at Duke: Why I Brought Death Cafés to My College Campus

By Jenna Yeam, 08/11/2025

This past year, I hosted Death Cafés at my college, Duke University. A [death cafe](#) is a community gathering where people come together to freely talk about whatever they want related to death and dying, without judgement. Every death cafe I've attended has a different character. The ages ranged and the topics varied. The unguided conversations were anything from caregiving concerns to existential dread. I left each cafe with a lot on my mind, and so, I found myself bringing the conversations into Facetime calls and dinner parties with friends. It made me wonder if other students would be interested in entertaining this type of dialogue. It has never been done before, so I wasn't sure what to expect. Would people come and talk? Is this too weird for Duke?

I proposed this idea through an ethics lab run at my school, and I brought in a team of students to help run these cafes. There was an application and interview process, which resulted in a team from all different majors and classes. At the first cafe, my anticipatory anxieties dissipated almost immediately. Some brave souls arrived alone while others came with a friend or two. Over Costco snacks and sodas, 40 students settled across scattered tables, and the conversations flowed, unprompted and raw.

The themes and conversation topics varied. They raised questions about how different ideologies approach the afterlife, what constitutes “the good death,” and what death rituals reveal about a society's values. At one table, an ex-Mormon sparked a conversation with a Jewish student on their faith systems' relationship with death. At another table, a Chinese student shared how his family did not tell their grandfather he was dying because they did not want to concern him with this information. We talked

Blog

Moving Away from Serious Illness, and Toward Better Health Care

By Dr. Erik Fromme, 08/08/2025

[Revising the What Matters to Me Workbook](#)

In 2021, The Conversation Project and Ariadne Labs published the “[What Matters to Me Workbook](#).” Our goal was to create a resource for patients with serious illness that would help them prepare to talk more effectively with their health professionals about their goals, values, and preferences.

Since its launch, the workbook has been used by 60,047 patients and clinicians and has gotten positive feedback for its accessibility and well-crafted language. But we also heard that the term “serious illness” could be an obstacle to patients and families, particularly for older people. So, we decided to take our four years of real-world learnings and see how we could make the tool even more effective for the people who need it.

[Why did we change?](#)

[Clinician feedback](#)

We wanted to make the workbook easier for health professionals to share with their patients. Clinicians who worked with people in their 80s and 90s told us that having “A Workbook for People with Serious Illness” on the cover — part of the tool's original title — was a barrier for some patients. The workbook might have been really helpful, but because the patient did not identify as “seriously ill,” they didn't think it was right for them.

The other thing we heard was that some of the questions were more challenging than others. One clinician suggested we split the workbook into two parts, with questions that apply to everyone in Part I, and questions that were more relevant to care through the end of life in Part II.

[Patient and caregiver feedback](#)

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Chat in

Anything on your mind about messaging?

What Matters to Me Workbook updates?

Things you'd like to be sure we cover today?

Make sure you send your message to

“Everyone.”



Messaging with a new tool

Talk up the positives

Present choices for every step

Use stories

Invite dialogue—and not just once

Invoke a new team

Imagery matters Use positive and aspirational images without looking too “cheesy”

Incorporate messaging principles into standard work for guides + social media/guest blogs

My Health Checklist



My Health Checklist

A guide to help you prepare for your medical appointment

Name

Date

Age-Friendly
Health Systems

An initiative of The John A. Hartford Foundation and the Institute for Healthcare Improvement (IHI) in partnership with the American Hospital Association (AHA) and the Catholic Health Association of the United States (CHA).

This work was made possible by The John A. Hartford Foundation.

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This guide is designed to help you get ready for your medical appointment(s).

It's meant especially for older adults.

First, it will help you think about different aspects of your health and living well. Then it will help you identify the most important questions or concerns you want to talk about with your provider. A provider is a doctor, nurse practitioner, primary care practitioner (PCP), etc.

Being prepared for your appointment can help you get the care that's right for you. You are part of the team. You can have a say in your care.

This guide focuses on four areas that can help you think about your health.



What Matters
to you in
your life



Medication
you may take



Your Mind
and sense of
well-being



Your Mobility

The 4Ms

For each of the 4Ms, we'll ask you about your situation now, what's going well, and what could be better. Then you can write down any questions you have or things you want to share with your provider.





What Matters

Think about what is most important to you and what you enjoy most. This can help you think about what's most important for your health.

- **Your situation now** • What are the most important things in your life right now? Have there been any health or life changes since your last appointment?

SOME IDEAS Being regularly in touch with the people I care about • Adjusting to retirement • Recent death in the family • Feeling anxious or worried

- **What's going well?** What activities do you like to do?

SOME IDEAS Play music • Watch sports • My job • Visit my grandchildren • Involved in my community

- **What could be better?** Is anything getting in the way of what you like to do?

SOME IDEAS Trouble sleeping • Caregiving for a sick relative or friend • Want to spend more time with people • Low energy • Harder to get around • Bladder control issues • Hard to get healthy food • Trouble hearing conversations

- **What do you want your provider to know about you?**

SOME IDEAS Who I'm responsible for • My goals for the year • Who I live with • I want to learn more about healthy eating • Still feeling "off" since the surgery • Who or what in my life makes me feel better • Who or what makes me feel worse





Medication

If needed, medication can be an important part of your health. It's important to make sure it's working well.

Some medication affects us differently as we age. It may interact with other medication or with food, sometimes negatively. We might want to start or stop taking it, or try a different dose.

- **Your situation now** • What medications do you take regularly (if any)? What medications do you take only when needed? Include vitamins, herbal supplements and oils, prescriptions, over-the-counter medications, and anything you take to feel better.

SOME IDEAS Calcium • Heart medicine • Inhaler (when my allergies act up) • Diabetes medicine • Daily aspirin

- **What's going well?** Are your medications helping you reach your goals?

SOME IDEAS More active • Better appetite • Sleeping better

- **What could be better?** Are your medications causing any problems?

SOME IDEAS Tired all the time • Medicine costs too much • Not sure if medicine is working • Feeling dizzy or nauseated • Bad reaction to medicine • Hard to keep track of what to take and when

- **What questions or concerns do you have for your provider?**

SOME IDEAS I can't afford to pay for my medicines • Do I still need all of these medicines? • Should we check my cholesterol/blood pressure? • Who can I call if I have questions? • Are my vaccines up to date?

NOTE • Always talk with your provider before starting or stopping a medication or changing how much you take.





Mind

This is about your mood and your sense of well-being.
It's also about your mental ability, including your memory.

Use the scales below to think about your situation now. There are no right or wrong answers.

Your situation now

How happy do you feel on most days?



How much do you worry about changes in your memory?



If applicable, how much do people near you worry about changes in your memory?



Do you want to add anything about your answers?

Have you noticed any changes in your mood or memory?

SOME Feeling happier • Worrying more • Forgetting words •
IDEAS Forgetting where I'm going

NOTE • Sudden confusion or sleepiness could be delirium. You might say things that don't make sense or forget where you are. Delirium needs to be treated. If you or someone you know sees these new changes, call a provider right away.

What's going well?

SOME Doing well at work • Excited to see my grandchild •
IDEAS When I feel upset, I have someone I can call •
Volunteering

What could be better?

SOME Feeling down most days • Trouble focusing •
IDEAS Experiencing grief or regret • Feeling lonely •
Relationships and intimacy

What questions or concerns do you have for your provider?

SOME Sometimes I forget things — do I have a health
IDEAS problem? • I'm stressed that I don't have the help I need





Mobility

Mobility is about how you move and get around. This includes everything from exercising to getting around the house to going places.

- **Your situation now** • How do you move around at home?
How do you get from place to place?

SOME IDEAS At home... I go for walks • On my feet a lot • I use a cane at times • I do physical therapy • I use a wheelchair
Getting around... I take the bus • My friend and I drive to errands together • Don't have a cell phone to reach people • I walk • There's no transportation for me

- **What's going well?**

SOME IDEAS My home is comfortable to move around in • I regularly do exercise videos • My foot pain is better • I walk my dog

- **What could be better?** Does anything limit you?

SOME IDEAS Trouble breathing when I walk • Feel unsteady when I shower • I've tripped and had a couple of falls • I don't want to drive at night • It's hard to carry my laundry to the machine • Hard to reach higher shelves lately • My back pain means I don't want to exercise

- **What questions or concerns do you have for your provider?**

SOME IDEAS I've had shoulder pain for a long time — what can we do? • Need a way to get groceries • What changes could make it safer to move around in my home? • I'm not very active — what activities are safe for me? • What if I can't live in my house anymore?



Putting It All Together

› Look back over all of your answers.

Write up to 3 of your most important questions or concerns for your provider.

1.

2.

3.

SOME How can I reduce my knee pain? • Can I take a test to
IDEAS check my memory? • How can I get stronger?

› You may want to talk your answers over with someone else – a family member, a friend, or another person. If you want, you can ask them to come with you to your appointment.

Their name:

› Your answers may change over time. You can come back to this guide any time to update your answers and write down more questions for your provider.

Bring your questions (and this guide) to your next conversation with your provider. Talking about the things that matter to you helps them understand you better. Then together you can choose the kind of care that's right for you.

To start the conversation, you might say: "Can we talk about a couple things that are really important to me?" It's okay to ask questions more than once if the answer isn't clear.

SCAN FOR
MORE
RESOURCES



Feedback

Validating experience of any illnesses or life circumstances

Recovering a sense of agency

Providing guidance

Being able to choose care that treats me as a person



“I am so glad my daughter shared this flier with me. When I was recently admitted through the ED, my nurse said that I was the most prepared patient she ever had. This flier helped me articulate my meds, needs and preferences. I was so organized that she didn’t believe I was 83! ” Ireland Hawkins

Chat in

Thoughts? Questions?

Have you integrated this messaging into your materials?

Make sure you send your message to

“Everyone.”

TCP QR Code

Feel free to use: presentations, events, handouts, newsletters, emails, etc.



TCP Convo Guides

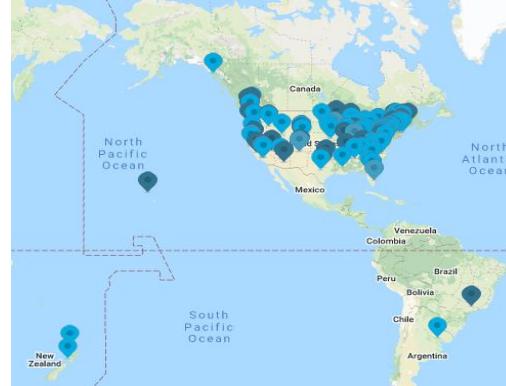
Share and connect with each other

Via TCP's network:

Community Champions Facebook discussion group



Champions Map



<https://theconversationproject.org/get-involved>

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Thanks and appreciation



The John A. Hartford Foundation
Dedicated to Improving the Care of Older Adults

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To support The Conversation Project's
ongoing work, donate here:



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