



Section Three: Overview

Why Financial Sustainability?

Imagine that Living Well is a standard part of the health and social services system in Oregon, covered by insurance, offered by employers, integrated into all primary care clinic and hospital discharge processes, and built into long-term budgets and multiple funding streams. Knowing that it was funded for the long term, we could focus on expanding the program to make it accessible to every Oregonian with a chronic condition, as intrinsic a part of our culture as Weight Watchers or walking shoes. This is the goal: financial sustainability.

For hands-on people whose primary interest is delivering community workshops, investing time and energy in establishing financial sustainability for Living Well may seem unappealing. However, it is essential for the long-term viability of programs in Oregon. If the issue of financial sustainability is not addressed, Living Well programs run the risk of losing financial support when funding gets tight or grant priorities change. Experience has shown that even brief lapses in funding can have major implications for programs like Living Well that rely on referrals from health professionals and the positive regard of the public.

In the last decade, self-management program delivery in Oregon has evolved from a handful of organizations providing a few Living Well, Tomando Control de su Salud and PSMP workshops to a thriving network of statewide partners that provide programs to thousands of Oregonians per year. The Living Well brand is increasingly recognized by local, regional and statewide policymakers, and chronic disease self-management is an increasingly recognized component of health care reform. Now is the time to build on this progress and make Living Well programs permanent. Unfortunately, many local and regional partnerships supporting program delivery rely on time-limited grant funding to underwrite salaries for key coordinator positions, provide stipends for leaders and support leader training.

During the recent economic crisis, even as new partners offered programs for the first time, many other organizations were forced to cut back on the number of programs they provided due to reductions in staffing and volunteer support. Support provided by the Oregon Department of Human Services and Oregon Health Authority for training and technical assistance is also time-limited, and is intended to assist establishment of self-sufficient, sustainable programs statewide over time.

The experience of the Oregon Tobacco Quit Line described in the sidebar demonstrates how difficult it can be to reestablish trust in a program when funding lapses and

An episode in the history of a free, publicly funded tobacco cessation support service shows why financial sustainability is crucial. When funding to the state Tobacco Prevention and Education Program was cut during the state budget crisis of 2003, the Oregon Tobacco Quit Line lost funding and service was discontinued for several months. Word traveled quickly among potential callers and health care providers who regularly referred patients, and even after service resumed, it was several years before call volumes and provider referrals to the Quit line returned to their original levels.



workshops go on hiatus, even briefly. It is more important than ever to establish funding streams that will assure potential program delivery partners, referral system partners, and potential participants that Living Well programs are dependable resources that will be available long into the future.

Financial backing for programs will be most sustainable when supported through policies at the local, statewide and/or national levels. With federal and state reform reshaping Oregon's health insurance, care delivery and information systems, now is the time to ensure that this important resource is preserved for years to come.

What Is Financial Sustainability?

Researchers have defined overall program sustainability as “the extent to which an evidence-based intervention can deliver its intended benefits over an extended period of time after external support from the donor agency is terminated.”¹ *Financial* sustainability refers to the financial aspects of programs that contribute to this long-term goal of overall sustainability. Programs that have developed these aspects are not solely dependent upon time-limited (grant) funding; they have established sources of funding that are viable over the long term.

Research indicates that financially sustainable programs share several characteristics:^{2,3}

- They strategically and continually **seek a diverse array of resources** to support their programs.
- They establish their programs as a priority in the view of their funders and advocates, and **incorporate their programs within existing delivery systems and funding streams**.
- They **provide a quality product** and work to **increase and demonstrate demand** for their programs so the need for sustainable funding is clear.
- **They engage in early financial planning** as part of an overall strategic plan, and keep expenses as low as possible through conservative spending and creative use of volunteers and in-kind support.

Although financial planning and cost management are outside of the scope of this document, they are important aspects of financial sustainability for Living Well programs. The University of Kansas Community Toolbox at http://ctb.ku.edu/en/tablecontents/sub_section_main_1297.aspx is a helpful resource. Providing a quality product is the focus of the Living Well Network Quality Assurance and Fidelity Workgroup; more information on how to achieve this goal is available online at <http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Pages/fidelity.aspx>.

1 Rabin, BA et al. (2008). A Glossary for Dissemination and Implementation Research in Health. *Journal of Public Health Management and Practice*, 14(2), 117-123.

2 Gordon C and Galloway T. *Review of Findings on Chronic Disease Self-Management Program (CDSMP) Outcomes: Physical, Emotional & Health-Related Quality of Life, Healthcare Utilization and Costs*. US Centers for Disease Control and Prevention and National Council on Aging, 2008.

3 *Lessons Learned on Sustainability of Older Adult Community Mental Health Services*. Substance Abuse and Mental Health Services Administration and US Centers for Disease Control and Prevention, 2011 [in press].



The following section of this toolkit focuses on the first two bullets above; read on for more information and resources.



How-To: The Pathway to Financial Sustainability for Your Program

The overarching goal for this work is to ensure that Living Well programs across the state are supported by **strong, ongoing revenue streams** so that people with chronic conditions can access this resource consistently and reliably. Ultimately, the opportunity to participate in the Living Well program should become a standard part of health and health care—something available to everyone with a chronic condition.

In this section of the toolkit we focus on a step-by-step approach to this goal:

1. **Crafting a persuasive case for support:** clarifying what we're asking for and why our audience should care.
2. **Developing a prioritized prospect list:** identifying your potential funders.
3. **Engaging advocates for funding:** finding the most appropriate people to carry your message to prospects.
4. **Making a plan:** clarifying who will do what, and when.
5. **Making the ask:** approaching potential funders to ask for support.

This process is actually quite similar to the way you find grant funding and program partners, and the strategy and tools outlined in this section and the next will support that ongoing work. However, the end goal is to secure sustained, long-term funding by embedding Living Well in an ongoing stream as part of a standard delivery of care.

This emphasis on financial sustainability is crucial. It is also new for many Living Well program partners and may take time to show results. Please put these tools to work and reach out if you need help. The Living Well Network Financial Sustainability Workgroup is a great resource. For more information, please visit www.healthoregon.org/livingwell or contact the Oregon Health Authority Living Well program at 1-888-576-7414.

What Is My Role in Financial Sustainability?

Although this section of the toolkit is geared toward local and regional coordinators, it will also be helpful to anyone involved with making Living Well programs a reality in Oregon. No matter what our role, we all can contribute.

In addition, when you start thinking about talking to top decision-makers about funding and program support, it's important to coordinate internally to ensure that you respect existing relationships and avoid duplicating efforts. Following these guidelines can help:



- Reach out to partners to create your case, brainstorm potential sustainable funding models for your community, and identify prospects and pathways (see steps and tools below).
- Check in with other Living Well coordinators in your area to see if they are planning to approach any of the same partners and might be open to a joint pitch for support.
- Work within your organization and the Living Well Network to find out whether there are relationships you might tap into or other activity or plans you should know about. For example, if you learn that your administrator is already talking to a potential funder, you might be able to integrate the requests—or at least ensure that you coordinate your outreach.

Step 1: Crafting a Persuasive Case for Support

Potential supporters of the Living Well program—whether internal advocates, pathways, or external funder prospects—will respond best when it is clear to them:

- Who you are.
- Why the program is needed.
- Why the program is effective.
- Where you hope the program will go.
- What investment is needed, and when.
- How their investment will be used.
- What the impact will be.

These answers are summed up in your **case for support**, a brief, compelling statement of the need for effective self-management programs and proof that Living Well addresses that need. It defines the core messages to be used in all your funding outreach.

Think of the case for support as the foundation document for any request to be made on behalf of the Living Well program—presentations, proposals, appeal letters, etc. It's the main message you will deliver whenever you have the opportunity to obtain sustainable funding. *A customizable case for support for the Living Well with Chronic Conditions program is included in section 3.2.a of this toolkit.*

INTEGRATE FINANCIAL SUSTAINABILITY MESSAGES INTO ALL COMMUNICATION

It is critical that all communication reinforce the message that:

- Living Well is a valuable, high-impact program that costs \$___ to provide per participant.*
- It relies on the generosity of funders who make the program available for no or low cost (name them).
- The goal is for Living Well to be a standard part of care—something everyone with a chronic condition can access—that is built into hospital discharge, primary care and insurance coverage.

Make sure to include these messages on your website; in program brochures, fliers, posters and ads; videos; presentations; and in the classes themselves (verbal acknowledgment as well as in any printed materials). This provides multiple benefits: It is an opportunity to thank those funders who've already committed, leverages those funders to inspire others, highlights the need for continued funding for the program, and builds an internal culture that respects the need to solicit support for the good work you are doing.

*A survey conducted in 2009 identified an average program delivery cost in Oregon of \$375 per participant. For more information on identifying the cost of delivering Living Well in your area, please see the National Council on Aging's cost calculator and cost calculator manual (linked under "Other Resources" at <http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Pages/resources.aspx>). For assistance using the calculator, contact the state Living Well program at 1-888-576-7414 or living.well@state.or.us.



The case for support document takes a step beyond the “elevator speech” discussed in section 2.5 by including information about your program’s local impact and specific financial support needs.

Once you have the general case, you can customize it for specific asks to align with your prospect’s interests and values. Please see the talking points and issue briefs for hospitals, insurers and employers for additional information you might include in your case when reaching out to those particular groups.

Step 2: Identifying Who to Ask

Once you’ve outlined a clear general case for supporting Living Well programs, it’s time to think more specifically about potential funders, or prospects.

See the information on potential funders in Appendix C for a list of possible sources, some background information on how they operate, thoughts on why they might support Living Well, what kind of support they might provide, and how to get in the door. This appendix addresses the following types of funding sources:

- Hospitals
- Employers
- Health insurers, including:
 - Commercial health insurance plans.
 - Medicaid managed-care organizations.
 - Medicare Advantage plans.
- Other sources: aging service providers and participant fees.

Using that information, start thinking about the various potential funding sources for your program. Some of these prospects may have strong relationships with you; some may never have heard of Living Well, but have a similar mission or areas of shared interest. Some may not be in a position to fund the Living Well program directly, but may have great influence. In some cases, you may know exactly who needs to hear your case; in others, you’ll need to ask around a bit to learn more and find the right person.

Keep in mind that finding potential organizational partners to work with is like starting any new relationship; it’s important to take the time to establish whether you are compatible before either can realistically expect too much commitment. However, looking for similarities in your organizations’ mission statements is a good way to initially identify potential partners.

You will also need to do some investigation into which funding streams outlined in the appendix are available in your community. It is important to have a sense of the overall health care and insurance landscape in your area, and to be aware of relationships between organizations and who’s competing for business. See the specific sections on sustainability partner organizations for tips.



Keep in mind that just as there is no perfect partnership model for delivering self-management programs in all of Oregon, there is no single best way to achieve the goal of financial sustainability for all local and regional Living Well programs in the state. Because of the tremendous local and regional variability across the state, organizations engaged in financial sustainability planning will need to use their best judgment regarding the most appropriate means to make their programs financially sustainable.

Your job is to think through the range of potential funding models, figure out who the decision-makers would be for each, identify the relationships you have with those people, and identify the best ways to move ahead. Here's how:

Develop Your List

Think about **prospect list development** like a target, with ever-expanding circles of connection and influence. Consider the three levels of supporters you can recruit to help you:

- Internal advocates: colleagues, supervisors, directors or administrators who can help you connect with the right people and support your efforts to advocate for funding.
- External pathways: those who may not be in a position to fund the Living Well program directly, but may serve as the connector to a potential funder by making introductions or giving endorsements.
- Funder prospects: those who you can ask to fund the program directly or to ensure that ongoing funding is committed for the program.

Use your Living Well brainstorming skills to generate a list of those who have the potential to incorporate Living Well into their funding stream and ongoing program model, or those who can help make connections to get the conversation started. *Answer the questions in the **Prospect Generator** in section 3.2.b to help guide your brainstorm.*

Prioritize Your List

Once you have a list of prospects and pathways gathered in one place, conduct an “**Identification, Qualification and Prioritization**” (IQP) session, preferably with a core group of people who are already involved with your program. Rate pathways and prospects for:

- Capacity to provide sustainable funding.
- Propensity (likelihood) to commit.
- Interest in providing support.
- Pathway to approach them and influence they may have on other organizations.

*Use the **IQP Session Template** in section 3.2.c to help capture your ratings and feedback.*

Look at the combined ratings and prioritize your top prospects and pathways, picking the best-ranked five to 10 to become your top prospects list. Through this process, you will know who is:



- Ready to be asked now.
- Involved with Living Well, but needs to know more.
- Knows about Living Well, but needs to be involved.
- Doesn't know the program and needs to be introduced.

Now that you have a short list of Top Prospects in hand, research a prospect profile for each, to include:

- Prospect name and contact information.
- Pathway and key relationships.
- Rationale (what makes this prospect a priority?).
- Funding interests/guidelines.
- Background (relevant information, program model and where Living Well could fit, etc.).
- Recommended approach (based on what you know or have learned about this prospect, what's the action item that makes the most sense?).
- Recommended team (who is best positioned to set the meeting and make the presentation/ask? Who will the prospect be most influenced by?).

Use the *Prospect Profile Template* in section 3.2.d to help capture your ratings and feedback.

Step 3: Engaging Advocates for Funding Outreach

To reach and engage your top prospects, you'll need to either already have a direct relationship with them, or to leverage relationships with people who have the capacity to offer their connections and resources to help you engage your top prospects.

For example, you may find yourself:

- Making a presentation about Living Well to your manager and asking him or her to make an introduction to a key administrator at a hospital that's on your top prospects list.
- Contacting someone you know from your county mental health services department to ask for help to brainstorm funding options.
- Asking a program leader to make an e-mail introduction to a program officer she knows from your local community foundation.

These are your internal advocates and external pathways—and they are invaluable in opening doors to potential funders.

Connect with these advocates and pathways to determine what level of support they are willing to give and how best to leverage their relationships. In a meeting:

- Provide a brief overview of the program and its impact (see the case for support in section 3.2.a), a brief statement of the need for sustainable funding, a description of how you envision



sustainable funding happening and the impact it will have. This presentation may range from something minimal for internal advocates who already know the program well, to something deeper for those who don't.

- Bring a specific, customized list of prospects (or even just one prospect) for whom the advocate or pathway may have information or influence.
- Ask for their help in ways such as:
 - Sharing information about key prospects.
 - Adding names to the prospect list.
 - Making introductions to potential funders or other influencers.
 - Attending selected cultivation and solicitation meetings.
 - Providing connections to major funders.
 - Championing the program overall.
- Thank them and be sure to follow up on all activities noted in the meeting.

Step 4: Make a Plan

Now that you know what you're asking for and who you'll approach for support, how do you make sure it all actually happens? Make sure to integrate key activities into your program's work plan and timeline to make sure they get accomplished. This document will be based on the needs of your audiences and the goals you have set out to accomplish, and the availability of your advocates and pathways.

Ideally, your work plan and timeline will specify the activities that need to happen, who's responsible, when they need to be done, what resources are needed to support them, and any important notes. Set realistic timelines that have been agreed to by the people involved. To reduce duplication of requests to potential financial partner organizations, consider engaging with the members of the Living Well Financial Sustainability Workgroup as you develop your work plan.

For example:

Action Item	Lead	When	Resources Needed	Notes
Presentation to Debbie Smith, CEO, Smart Hospital	Julie Adams, with support from Amy Williams	4/1/11	PowerPoint presentations, talking points, brochure/documentation to leave behind	Debbie Smith is the sister-in-law of Amy Williams

Track activities by date, and make sure the lead is aware of his or her responsibilities. Integrate the topic of financial sustainability into your regular meeting agendas to report on progress. *Consider using the **Work Plan-Timeline Template** in section 3.2.e to help capture activities.*



Step 5: Making the Ask

Getting the Meeting

- Make an initial outreach call to respectfully ask for an opportunity to meet briefly to share information about the Living Well program, the benefits it offers and how the prospect might help it have even more impact. Be prepared to speak briefly about the program in case they want more information before accepting a meeting. Keep it brief, and focus on why you think the prospect would be interested in hearing about the program. Use the talking points in the appendix of funder options (Appendix C) as a guide.
- If the prospect is willing to meet, offer times and find out if anyone else should join the discussion.
- If the prospect is unwilling to meet, respectfully ask why. Depending on his or her answer, it may mean he or she is unwilling to meet right now (maybe they're just busy and you could call back in a month) or simply needs more information (in which case, provide it). Or it could mean the prospect is not a good fit for funding your program, in which case you can thank him or her for the time and move on to another top prospect. If appropriate, ask that person if there are other prospects you should be contacting.

Preparing for the Meeting

- Learn as much as you can about the person you will be meeting with. Know if he or she already hosts or supports Living Well or a similar program, and be clear about how it will benefit him or her to make Living Well sustainable. Also, research the person's role within the organization—is this individual someone who can be a good champion for program funding? Is he or she the final decision-maker?
- Determine who from your team will attend the meeting. Who will have the most relevant connection with the person/people you're meeting with? Who can make the strongest case for the program and the importance of long-term financial stability? How many people will you be meeting with, and how does that balance with the number of people you're planning to bring?
- Determine who may have influence with the people you're meeting with, even if they aren't attending the meeting. Can your influencer make a supportive phone call before or after your meeting?
- Determine who will say what. Clarify roles and assign talking points. Brainstorm anticipated questions or objections, and practice responses. Remember that you are there to listen more than talk, so plan an agenda accordingly (e.g., for a one-hour meeting, plan a maximum of 30 minutes of presentation and leave lots of time for questions and discussion).
- Determine what materials you will leave behind, such as a customized print version of your presentation, customized cover letter, brochure, issue brief, case for support, budget, relevant case studies, and/or media stories. Make sure materials are customized, proofread and presented in a logical, organized format.

**Conducting the Meeting**

When the door opens for a discussion with a potential funder, use the opportunity to build a relationship, obtain information, gauge interest, and engage the prospects in the program and its impact. This likely will not mean making a direct funding request at the first meeting—or even the second or third meeting.

Cultivation of relationships with potential funders can take time and should be seen as a process of discovery, a time to ask questions, listen, and learn about the prospect's needs, values and motivations. It is also a time to infuse the prospect with your enthusiasm and inspire that person through real-life success stories from the program.

- Acknowledge prior involvement in or support of the Living Well program.
- Establish mutual interest in the program's success.
- Make the case using the case for support as a guideline for talking points.
- Be prepared to share a story from a real participant (see the **storytelling tool** in section 3.2.f for assistance).
- Encourage discussion and answer questions.
- Mention others who have supported the program.
- If/when the time is right, make the ask.
- If the answer is no, politely ask about concerns and what might help to overcome them (additional information, etc.).
- Ask for “leads” to other leaders or organizations you could talk with.
- Follow up:
 - Within 24 hours: Send meeting notes to relevant parties, send thank-you letters, and reach out to advocates who can help influence this ask.
 - Within one week: Send follow-up package restating the case/the “ask” and responding to key comments/questions raised in the meeting.
 - Within three weeks (if no response has been received, unless the prospect identified a different timeline): Follow up with a phone call to discuss next steps or to negotiate this funding

For assistance with financial sustainability

Again, building financial sustainability for your program is hard work that takes time to show results—and is new for many Living Well program partners. The Living Well program staff at the Oregon Health Authority (OHA) is a great resource, as is the LW Network Financial Sustainability Workgroup. Contact OHA at 1-888-576-7414 to get connected to the workgroup, or visit <http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Pages/network.aspx> workgroup minutes and information. Thank you for your great work and dedication to these programs!



TOOLS YOU CAN USE FOR FINANCIAL SUSTAINABILITY

General Financial Sustainability Tools

Section 3.2.a	Case for Support
Section 3.2.b	Prospect Generator
Section 3.2.c	IQP Session Template
Section 3.2.d	Prospect Background Template
Section 3.2.e	Work Plan-Timeline Template
Section 3.2.f	Storytelling Tool
Section 3.2.g	Financial Sustainability Prospect Presentation Template
Section 3.2.h	Financial Sustainability Prospect Presentation Notes
Appendix B	Chronic Disease Prevention and Management Model Benefit
Appendix C	Potential Organizational Partners for Financial Sustainability

Handouts: Living Well with Chronic Conditions Issue Briefs

Appendix C2, p.139	Hospitals
Appendix C3, p.147	Employers
Appendix C4, p.153	Insurers

Talking Points for Specific Audiences

Appendix C2, p.144	Hospitals
Appendix C3, p.151	Employers
Appendix C4, p.164	Insurers

Oregon Living Well Impact Report

<http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Documents/LivingWellProgramImpactReportFinal.pdf>



Case for Support

*Your case for support helps you clearly communicate **what** Living Well is, **why** it matters, what **impact** it makes, and **how** sustainable funding will make it even more effective.*

Personalize the yellow highlighted sections in this case for support with specific information about your program, then use it as the basis for your outreach, presentations and funding requests. Pair it with the talking points and issue briefs for specific audiences (hospitals, employers, insurers) (Appendix C) to be sure you're addressing their unique needs.

The Problem: Chronic Diseases are on the Rise

Chronic diseases—heart disease, stroke, cancer, diabetes and arthritis—are among the most common, costly, and preventable of all health problems in the U.S, according to the Centers for Disease Control and Prevention. Half of all Americans have at least one chronic disease, and seven in ten U.S. deaths each year are from chronic diseases.¹

Every year in Oregon, chronic diseases claim the lives of 19,219 people and result in \$1.4 billion in hospitalization costs.² In addition, they cause countless missed work days.

[Add local data here from *Keeping Oregonians Healthy*, Appendix C.³]

Much of this could be prevented or lessened by creating communities where everyone can eat well, move more, avoid tobacco use and obtain regular health screenings. In the meantime, for the many people who already have chronic diseases, and for those diseases we can't entirely prevent, we must help Oregonians live better with their health conditions.

A Solution: Helping People Live Well with Chronic Conditions

Living Well with Chronic Conditions is a workshop that helps people learn to take good care of themselves, creates a supportive environment and builds community. The goal is to help them avoid unnecessary hospitalizations, make medical treatments more effective and improve their health.

The six-week, evidence-based program was developed by Stanford University and is supported by the Oregon Health Authority. There's also a culturally appropriate, Spanish-language version called Tomando Control de su Salud, and a seven-week version for people living with HIV/AIDS called Positive Self-Management.

¹ <http://www.cdc.gov/chronicdisease/overview/index.htm>

² Oregon Department of Human Services. *Keeping Oregonians Healthy*, 2007.

³ <http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/Documents/healthor.pdf>

³ *Keeping Oregonians Healthy* (see note 2 above).



Participants learn how to deal with issues such as fatigue, frustration, pain and isolation. They learn exercises that help maintain strength and flexibility. They gain information on properly using medications, communicating with health care providers, and evaluating new treatments.

Dozens of organizations offer Living Well workshops around the state, and more than 5,600 Oregonians have participated in the program so far. Workshops are available in 27 counties, and an online version is being piloted.

Here in XXX county/city/town/area, Living Well is offered [insert specifics about number of classes, locations, how long the program has been offered, etc.]⁴

Return on Investment and Health Care Savings

Living Well works. Participants have less pain, more energy and fewer hospitalizations. Relationships with fellow participants last beyond the workshops, creating a support system across the community. Entire families often benefit, too, as participants bring home new ideas and integrate healthy behaviors into their routines.

A review by Dr. Viktor Bovbjerg, associate professor of public health at Oregon State University, estimated that the program has helped participants avoid more than \$7 million in medical costs due to emergency room visits and hospitalizations. Dr. Bovbjerg recommends making Living Well accessible to more Oregonians and incorporating it into health reform efforts.

Help Expand this Successful Program

It is with this potential for better health and lower health care costs in mind that we ask for your help in making the Living Well program a standard, funded part of our health care system. Our vision is that Living Well will be covered and available just like clinic visits or hospitalization.

Currently, the Oregon Health Authority and Oregon Department of Human Services (DHS) support leader training through funding from the Centers for Disease Control and Prevention and the Administration on Aging. However, delivery of local programs like ours is underwritten locally, through grants and in-kind support from community organizations.

Here in XXX County, most of our funding comes from [annual grants from XXXX, etc.] This short-term, patchwork approach to funding means there is little financial stability to the program and a strong need of more long-term partners to support it.

To ensure that Living Well is accessible to all Oregonians with chronic diseases, please consider [adding classes to your standard offerings, adding Living Well to your covered benefits, providing Living Well to all patients, etc.].

⁴ Living Well county-level reports:

<http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Pages/pubs.aspx>



With your support, the Living Well program can help make it possible for individuals with chronic health problems to live successfully, for communities to embrace health and disease prevention, and to reduce the demand on our health care system.

[Close with a testimonial from a program participant saying what an impact Living Well had on his/her quality of life, and/or from a health care provider talking about how much the program helps patients and makes his/her work more effective]

For More Information

You can find more information by visiting our website at [insert your website or OHA's website⁵] or by calling [phone number].

⁵ <http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/LivingWell/Pages/Index.aspx>



Prospect Generator Worksheet

The prospect generator worksheet is a series of questions to help you identify potential champions, pathways and funder prospects, starting with those closest to you and moving to those who may not know you yet.

This exercise helps you think through the various levels of relationship your organization has with people and organizations that have the potential to become significant donors or champions for your program. It is designed to help you cast your net wide and create a large list of possible supporters you will then more carefully evaluate for capacity, propensity, interest, influence and pathway.

1. What funding opportunities exist for Living Well?

2. How do we get in front of them?

- Who are the ultimate decision-makers?
- Who influences these decision-makers? Would they be willing to be a champion for your program?

3. Who is already connected to Living Well?

- Who are the colleagues, supervisors, directors or administrators who can help you connect with potential funders?
- Can these people also advocate internally for the Living Well program?

4. Who is already in your funding or social network?

- Who currently funds your program?
 - Have you engaged them in the dialogue about needing a strengthened, sustainable revenue stream for the Living Well program?
 - Have you talked to them about creating a long-term funding strategy?
 - Have you talked to them about introducing you to other relevant funders?



- Can they help you publicize the need for sustained program funding?
- Who is volunteering for the program? Who are the past advocates (staff and non-staff) for the program?
 - Do the individuals named above work for the prospective funder? Can they introduce you to decision-makers?
 - Would they be willing to champion the program in their circles?

5. Who is operating in your community?

- What nonprofits in your region or area of focus are working on similar projects or issues?
 - Who funds them?
 - Would they be willing to connect you with their funders?
 - Is there a partnership opportunity? Are they seeking to contract with someone to help achieve a mission or enhance their capacity to complete a project? Would they be able to help publicize the need for ongoing financial support for Living Well?
- **What governmental bodies might be focused on issues similar to your areas of interest?**
 - Are any of the above agencies looking for someone to contract with to provide needed services to their constituents?
- **What local companies sell to the broader health care field?**
 - Have you ever reached out to them? If yes, what was the result? If no, why not?
 - Even if the company is not in a position to fund your program, over whom do they have influence? Can they serve as a champion for the program to other potential funders? Can they help publicize the program?
- **What companies are key players in the community and benefit from being positioned as supporters of a healthy community (largest employers, key beneficiaries of public investment, large community-wide customer bases, etc.)?**



Prospect Profile Template

Prospect Name:

Contact Information:

E-mail:

Phone:

Address:

Preferred method of contact:

Pathway/Key Relationships:

Ask Strategy & Rationale:

Why is this prospect a priority?

What are we asking for?

What are their funding interests and application guidelines?

Based on what we know/have learned about this prospect, what's the approach that makes the most sense?

Background:

Include brief notes about the prospect's history/biography, financial assets, philanthropic track record, etc.

-
-
-
-

Recommended Team:

Primary cultivator/contact:

Other volunteer(s):

Staff/support person:



Living Well Storytelling Tool

Storytelling is a powerful way to illustrate the effectiveness of your program, show the potential for greater impact, and make a point about the need for sustainable funding. It also adds human appeal to your case and lets you get away from statistics and numbers.

Gather at least two stories from your local program to use in presentations, materials and other outreach. These might be profiles of people who have benefited from Living Well workshops, a leader who has seen changes in participants, a doctor who sees the benefits in his/her patients, an employer who refers employees, etc.

Good stories share several key elements. These are outlined below, along with questions to brainstorm as you build your story.

Elements of effective storytelling	Questions to get you there
Opening —Start with a compelling opening that grabs your audience’s attention. Often unveiling a startling fact, sharing a great anecdote or saying the unexpected can do the trick.	<p>Is there anything especially <i>touching, encouraging, unusual, compelling</i> or <i>ironic</i>?</p> <ul style="list-style-type: none"> • What benefit can you illustrate? • What was the unexpected outcome? • What was the life-changing impact? • NOTE: Sometimes it’s easiest to lay out your story first, then think about the opening.
Background —Provide just enough background information so that the reader can understand your story.	<p>What are the <i>background elements</i> of your story that your audience needs to know?</p> <ul style="list-style-type: none"> • Who is the person/people involved? • When, why and how did this person become involved in Living Well?
The Barriers —Good stories have a problem to overcome or an issue to be addressed.	<p>What were the <i>main barriers</i> the person had to overcome?</p> <ul style="list-style-type: none"> • What caused the person to seek out Living Well? • What challenges stood in the way? • What was unexpected or surprising?



<p>The Opportunities—Good stories also provide hope.</p>	<p>What were the <i>opportunities, successes or ah-ha moments</i>?</p> <ul style="list-style-type: none"> • What's good? What's working? • What improvements in health have materialized? • Who benefits?
<p>What Now?—So what do we do with this new knowledge?</p>	<p>What <i>conclusions</i> can you draw? What <i>call-to-action</i> does this create?</p> <ul style="list-style-type: none"> • What is happening now that wasn't happening before (better health, more movement, savings in health care costs, back to work, etc.)? • Who else can benefit? • What advice would the subject of the story give? • What can we do to make this opportunity available to everyone?

Other Tips:

- A good story can convey an important message and also be compelling—it doesn't have to be dry! Find ways to interject real people, anecdotes and quotes into your story.
- Use descriptive language so that your audience can put themselves in the story and try to understand it first hand.

Financial Sustainability**Putting It Into Practice**

Use this grid to develop your success story. An example is provided, along with a sample story.

Questions
<p>What are the background elements of my story that my audience needs to know? <i>Maria, in her late 50s, had poorly controlled diabetes. She had foot pain that bothered her, so she got little exercise, ate an average of 10 tortillas with each main meal, and struggled with her weight.</i></p>
<p>What barriers existed? <i>She has two flights of stairs in her home, and it was getting more and more difficult to get to her bedroom. She also took a fall while walking her dog, and became afraid to leave the house or even to go to the grocery store less than a mile away.</i></p>
<p>What's the good news? What opportunities, successes and ah-ha moments exist? <i>After Maria and a friend participated last fall in a Tomando Control workshop in Pleasantville, Oregon, through Pleasantville Senior Center, she got her physician's help in finding special shoes that have reduced her foot pain. She has started exercising regularly by walking her dog around the neighborhood, cut back to five tortillas a day (so has her husband!), and is losing weight. Her blood glucose readings are now mostly in the normal range.</i></p>
<p>What now? Who else can benefit? How do we extend this opportunity? <i>Maria's best friend has asthma and attended the same workshop, and they now often cook and exercise together. Maria's church is interested in co-hosting Tomando Control classes with the senior center. The church is a major social hub for the local Latino community, and is a promising partner for extending the program to many un- and underinsured people, many of whom are living with chronic health conditions and get much of their medical care in the hospital emergency department. Workshops are currently funded by a grant that ends soon. Finding a funding source to make workshops available in the future would make a major positive impact in the health of the community of Pleasantville.</i></p>
<p>Is there anything touching, encouraging, unusual, compelling or ironic about your story that might make a good introduction? <i>Maria enjoyed the workshops so much that she became a volunteer leader. She has now led three workshops. Because her diabetes is now well controlled, her physician cleared her to travel to her granddaughter's wedding in Mexico next month.</i></p>



Sample Success Story

Furry and human friends help Pleasantville woman manage diabetes

Maria Valdez had no idea how much of a dog lover she was until she got her diabetes in check thanks to the Tomando Control de Su Salud program.

Before enrolling in the program at the Pleasantville Senior Center last fall, Valdez, 55, had severe foot pain—a common complication of diabetes—and almost never exercised. She also struggled with her weight. When her dog, Rex, chased a squirrel while she was walking him in the park last fall, she fell. While she wasn't badly injured, the incident frightened her so much she didn't even want to go to the store for groceries.

But after Tomando Control de Su Salud taught her how to communicate effectively with her doctor, set safe, attainable exercise goals and eat more healthful foods, Valdez has noticed a lot of positive changes. She has new shoes designed to minimize diabetic foot pain that she wears for daily walk with Rex around her neighborhood. She even found companions for herself and her dog. She told a neighbor with asthma about Tomando Control, and they took the workshop together. Now they walk their dogs together every morning.

Valdez also gets her feet checked regularly, and all the exercise and better eating have helped lower her glucose levels and lose 20 pounds. She is also excited that her doctor has cleared her to attend her granddaughter's wedding in Mexico next month, with Rex taking part as ringbearer.

Another goal for Valdez is ensuring Tomando Control continues to be offered in her community, especially since she's become a volunteer leader. She believes a long-term commitment to Tomando Control by a partner organization in the community, rather than the short-term grants that support it now, will allow many others with chronic diseases to learn the benefits of self-management and share their own success stories.

For more information about Tomando Control, and opportunities for sponsors, contact the Pleasantville Senior Center at 541-111-1111.



Helping People with Chronic Diseases Live Well

A presentation to: [NAME]
Presented by: [NAME, AFFILIATION]

(Date)



Chronic Conditions

Consider the magnitude of chronic disease:

- The 27% of Americans with multiple chronic conditions account for 66% of health care spending.¹
- Every year in Oregon, chronic diseases:²
 - Claim the lives of 19,219 Oregonians.
 - Result in \$1.4 billion in hospitalization costs.
- [*Add local statistics here*]

¹ US Department of Health and Human Services. *Multiple Chronic Conditions—A Strategic Framework*, 2010.
² Oregon Public Health Division. *Keeping Oregonians Healthy*, 2007



Chronic Conditions (cont'd)

We can prevent or lessen these impacts through:

- Eating healthfully.
- Moving more.
- Avoiding tobacco use.
- Getting regular health screenings.
- Communicating better with providers, loved ones and caregivers.

We must create opportunities that put healthy options within reach of everyone.



The Living Well with Chronic Conditions Program

- Six-week workshop, 2-1/2 hours per session
- Free or low-cost to participants
 - Actual program cost is \$375 [*or local cost*]
- Led by trained peers living with chronic health conditions



The Living Well with Chronic Conditions Program (cont'd)

The workshop teaches skills for managing chronic health problems:

- Setting achievable goals and problem solving.
- Dealing with fatigue, frustration, and pain.
- Maintaining strength and flexibility.
- Properly using medications.
- Communicating with health care providers.
- Evaluating new treatments.



Living Well ~ Impacts for Oregon

- More than 5,600 Oregonians have participated.
- Dozens of organizations offer workshops in 29 Oregon counties.
- Tomando Control de su Salud: culturally adapted, Spanish-language version.
- Helped participants avoid more than \$7 million in medical costs due to emergency room visits and hospitalizations.





Living Well ~ Funding

Currently funded by time-limited sources:

- Oregon Health Authority/Department of Human Services
- US Centers for Disease Control and Prevention, US Administration on Aging
- *[Add local time-limited funding sources here]*



Living Well ~ Funding (cont'd)

Background:

The cost of delivering Living Well programs is not covered through state or federal grants.

The result:

- Programs are supported by strong local partnerships and aren't dependent on federal or state dollars.
- Programs must be "owned" locally, with long-term financial support.





Living Well ~ Funding (cont'd)

To ensure Living Well is accessible to all Oregonians with chronic diseases, and to make it a regular part of our health care system, we seek to invest:

- *[Add overarching uses of funds and amounts needed, over what time period]*
- *[Shoot for three to five bullets]*
- *[Customize based on your specific ask to your specific prospect]*



Living Well ~ Generating Support

We ask for your help in generating support for the program:

- Share with others what you've learned today.
- Advocate for funding for this program.
- Connect me with potential long-term funding sources.
- *[Customize based on your specific ask to your specific champion]*





Why It Matters ~ Hospitals

- Prevent unreimbursed hospitalizations and emergency room visits.
- Help patients improve communication with their health care providers.
- Provide a valuable community service by helping people with chronic conditions feel better, stay independent and increase energy and self-confidence.



What Hospitals Can Do

- Help support Living Well:
 - Sponsor workshops.
 - Host leader training and recruit volunteers to lead.
 - Refer patients and publicize programs.
- Make Living Well a standard health education offering:
 - Provide space and healthy snacks.
 - Underwrite scholarships.
- Make Living Well a routine offering at discharge and a standard employee benefit.





Why It Matters ~ Insurers

- Helps members avoid the emergency room and unnecessary hospitalizations.
- Help members improve communication with their health care providers.
- Shifts a portion of the health care burden off the delivery system while empowering and activating members.



What Insurers Can Do

- Incorporate Living Well into standard disease management offerings.
- Cover workshops as a primary benefit.
- Provide outreach and incentives to encourage members and employees to participate.
- Help support delivery of programs in local communities.





Why It Matters ~ Employers

- Build a healthier, more successful and productive workforce.
- Keep valuable employees at work.
- Prevent unnecessary worker's comp claims, emergency room visits and hospitalizations.



What Employers Can Do

- Make Living Well a standard employee benefit and encourage employees to use it.
- Ask your health plan and employee assistance program to include Living Well workshops as a covered benefit.
- Host Living Well workshops at your worksite. Publicize Living Well programs to your employees, and provide incentives for participation.





What Employers Can Do (cont'd)

- Develop flex time or sick leave policies that support employees in attending Living Well workshops.
- Encourage Living Well for family members of employees, and support employees in attending with family members.
- Support employees who want to be trained as Living Well leaders, through flexible work arrangements.



Thank You

With your support, the Living Well program can help make it possible:

- To reduce the demand on our health care system.
- For communities to embrace health and disease prevention.
- For people to **Live Well with Chronic Conditions.**

Thank you for your consideration!



Contact Information

[Your name, title, organization]

[Your phone number]

[Your email]

[Local phone/web address for program information]

Statewide program information:

1-888-576-7414

www.healthoregon.org/livingwell





Financial Sustainability Prospect Presentation Notes

Slide 1:

- Thank you for the opportunity to speak to you today!

Slide 2:

- Examples of chronic diseases include heart disease, asthma, diabetes and arthritis.
- Chronic diseases are taking a huge toll on our state and our health care system, and we feel their impact locally, too.

[You can add local statistics about chronic disease here; Appendix C of *Keeping Oregonians Healthy*¹ has county-specific information on death rates, prevalence of chronic diseases, and prevalence of chronic disease risk factors.]

Slide 4:

Living Well is about teaching people practical skills for making use of healthy options and following through on their health care providers' recommendations.

Slide 5:

What makes Living Well different from traditional health education?

- Most people with chronic conditions have the “laundry list” of what they need to do, but they may not know how to get started
- Attending Living Well is like being given a tool kit and shown how to use the tools

Slide 6:

More than 600 leaders have been trained.

An online version called Better Choices, Better Health is being piloted in 2010-2011.

Slide 7:

Funding for Living Well programs from the state goes to county public health agencies to develop partnerships in the community to support Living Well.

The state provides program infrastructure, including a website, toll-free information line, training, marketing materials and statewide coordination.

¹ <http://public.health.oregon.gov/DiseasesConditions/ChronicDisease/Documents/healthor.pdf>



Slide 8:

We need your support to cover the cost of delivering programs and make this valuable program available long-term.

Slide 11:

The average cost to deliver the program is \$375. Compare this to the thousands of dollars a hospital could spend on a single un-reimbursed admission or emergency room visit.

Slide 13:

The average cost to deliver the program is \$375. Compare this to the thousands of dollars an insurer spends on avoidable emergency room visits and hospitalizations.

Slide 15:

The average cost to deliver the program is \$375. Compare this to the cost of missed workdays and increased health care costs due to avoidable emergency room visits and hospitalizations.