

# *Living Well with Chronic Conditions*



## **Marketing Kit**

*Successfully Promote and Fill Your Workshops*



Wisconsin Institute  
for Healthy Aging

[www.wihealthyaging.org](http://www.wihealthyaging.org)

# Table of Contents

---

<b>Introduction</b> .....	4
<b>Filling Your Workshop: Getting Started</b> .....	5
Recruiting Participants: The Basics.....	5
Ideas for Recruiting Participants.....	6
<b>Face-to-Face Presentations</b> .....	9
Talking Points: Convey the Benefits of <i>Living Well</i> .....	9
<i>Nonprofit Social Service Organizations</i> .....	9
<i>Hospitals, Clinics, and Health Plans</i> .....	10
<i>Local Health Departments</i> .....	10
<i>Aging Service Organizations</i> .....	11
<i>Employers</i> .....	11
“Elevator Speeches”.....	12
<i>Sample Elevator Speeches</i> .....	12-13
“Selling” Living Well Presentation.....	14
“Session Zero” Presentation.....	15
<b>Creating a Person-to-Person Referral Program</b> .....	16
“Tell a Friend” Postcard.....	16
“Tell a Friend” Letter.....	17
Getting a Picture or Testimonial.....	17
Volunteer Ambassadors.....	18
Wristbands.....	18
<b>Engaging Health Care Providers</b> .....	19
<b>Marketing in the Media</b> .....	23

Using a Public Service Announcement (PSA) .....	23
<i>Sample PSA</i> .....	23
Submitting a Media Release .....	24
Submitting Notices for a Community Calendar .....	26
<i>Sample Community Calendar Notices</i> .....	26
Appendix A: <i>Face-to-Face Presentations</i> .....	27
(1) Case for Support – Statistics on Chronic Diseases	27
(2) “Session Zero” Presentation Guide .....	30
(3) <i>Living Well</i> Interest Sheet .....	33
(4) Sample “Ticket” for Workshop Registration ...	34
<b><i>Available on WIHA website:</i></b>	
<b><i>“Selling” Living Well Presentation Guide</i></b>	
<b><i>“You Can Break the Symptom Cycle!”</i></b>	
Appendix B: <i>Creating a Person-to-Person Referral Program</i>	35
(1) Share Your Story: Participant Testimonial .....	36
(2) Sample “Tell a Friend” Letter .....	37
(3) Sample Recruitment Letter from Community Leader	38
Appendix C: <i>Engaging Health Care Providers</i> .....	39
(1) Sample Informational Letter to Health Care Providers	40
(2) Key Talking Points for Health Care Providers:	
“The Three C’s” – Cost, Convenience and Credibility	41
(3) Case for Support: Health Care Providers .....	42
(5) Program Brief for Health Care Providers .....	43
(6) Sample Program Cover Letter to Health Care Provider	44
(7) Sample Participant Letter to Health Care Provider	46
(8) Sample Provider Recommendation Form .....	47
(9) Sample Prescription Pad Recommendation Form	48
Appendix D: <i>Marketing in the Media</i> .....	49
(1) Sample Newsletter Article .....	50

# Introduction

---

As an individual involved with *Living Well* workshops, you know the incredible impact that this program has on participants' lives. It gives people confidence, helps them feel better, and allows them to do the things they want to do in life. Thank you for helping to share this program with others!

With your Leader Training completed and a workshop in your community scheduled, the next step is *recruiting participants*! The tips and advice in this kit will help you fill your workshop, whether it is your first... or 31st!

Be prepared to spend as much time promoting your workshop as you do planning it (if not more!). Participant recruitment needs to be done on a consistent and ongoing basis.



Use a variety of marketing strategies to recruit participants from throughout your community. **To successfully fill your workshop, concentrate the majority of your time and efforts on strategies that have been repeatedly shown to be the most effective.**

The following rating scale, used throughout this kit, identifies what research has shown about each strategy's effectiveness in recruiting participants.

**Most Effective = ★★ ★**

*Strategies that successful Leaders have identified as being the most effective way to fill their workshops.*

**Moderately Effective = ★★**

*Strategies that can be useful in recruiting a few participants here and there.*

**Least Effective = ★**

*The most commonly used marketing strategies, but generally the least effective if used alone. These should only be used to complement other marketing strategies, rather than as the sole type of outreach to potential participants.*

## **Filling Your Workshop: *Getting Started***

---

Start by meeting with a Leader Coach, Local Coordinator, or your sponsoring agency to discuss the following ideas. They will be a great resource to help strengthen the knowledge and connections you need to be successful.

### ***Recruiting Participants: The Basics***

**1. Think Audience**

- Think about the people your community sites are trying to recruit into their programs. Who are they? Where do they live? What do they care about? Where do they congregate? Where do they get their information? Use this knowledge to think about message and communication strategies that will work.

**2. Get Your Message Out Early and Often**

- Don't wait. Start getting the word out at least eight weeks in advance of the workshop. Promote, promote, promote!
- Help to preview the program and attract "the most interested" with face-to-face presentations to groups in your target audience (e.g. senior centers, senior housing, churches, support groups).

- Seek out participant “champions” who can tell their peers about the program and bring in new participants once the community has run a workshop.
- Use regular announcements in event listings in local papers as a complement to the awareness generated by face-to-face presentations and meetings. Research shows that these general announcements just don’t work as the sole marketing strategy used.

### ***3. Learn About Existing Relationships in Your Community***

- Reach out early to city and county staff, nonprofit, religious, and other leaders who can help you reach their constituents or members. Relationships with key organizations in your area are critical to creating robust communication channels.
- Find out more about the connections that your local partners already have. Ask them to introduce you as someone who can help their members (e.g. the Aging & Disability Resource Center may already have contacts with several community entities).

### ***4. Build Your Infrastructure***

- Create a list or database and enter the name and contact information of each person who calls or looks for information about a workshop. Keep building this list and keep sending messages to individuals on the list by phone, email, or mail. These are your best prospects.
- Develop a list of key media outlets in your area – TV, radio, and newspapers – particularly those that have a significant readership/viewership that matches your target audience.

### ***5. Use Our Materials!***

- These can save you time and effort. That’s why we created them – for you.

## ***Ideas for Recruiting Participants***

Below are some starting ideas on how and where to recruit potential participants. Later in this kit you will find specific instructions and materials for most of these strategies. Focus your efforts on the most effective ones to successfully fill your workshop.

### ***Sustained, Personalized Marketing***

- ★ ★ ★ Contact current or past participants and ask them to invite others they know to sign up for the workshop. [\[Appendix B-2\]](#)
- ★ ★ ★ Meet with support groups (e.g. cancer, arthritis, diabetes) in hospitals and throughout the community. Serve as a guest speaker at one of their meetings to explain the workshop or offer to do the “Session Zero” presentation. [\[Appendix A-2\]](#)
- ★ ★ ★ Speak with people in other health education classes, including classes sponsored by other organizations (e.g. Red Cross, YMCA, community rec centers, health care providers).
- ★ ★ ★ Give presentations in places where older adults are served and congregate (e.g. senior centers, meal sites, churches, service clubs, professional retiree groups).
- ★ ★ ★ Submit a personal interest story to a local paper. Highlight an individual’s experience with their chronic condition and the impact *Living Well* had on their life.

### ***Other Marketing Channels***

- ★ ★ Talk with local pharmacists. Ask them to recommend the program. Ask them to put a *Living Well* flyer in prescription bags of adults whose medication list indicates they have a chronic condition.
- ★ ★ Talk with care transitions teams, hospital discharge planners, and social workers about recommending and giving brochures to patients they meet with.
- ★ ★ Target and meet with community leaders (e.g. church leader, Rotary Club president). Tell them about *Living Well* and ask them to endorse *Living Well* recruitment letters [\[Appendix B-3\]](#) to their members on behalf of their organization.
- ★ ★ Inform and invite people who have signed up for your partnering organization’s programs in the past.

### ***“Impersonal” Marketing Channels***

- ★ Contact local agencies that put out a community newsletter (e.g. a quarterly hospital newsletter, ADRC monthly newsletter). Find out what kind of articles they include and if they would be willing to run one about *Living Well* and/or upcoming workshops. [\[Appendix D-1\]](#)

- ★ Include an announcement in your sponsoring organization's publications, as well as community newspapers [\[Appendix D-2\]](#), radio, senior magazines, etc.
- ★ Put up flyers on community boards in activity centers, senior centers, fitness centers, wellness centers, and health food or product centers.
- ★ Ask local grocery stores to put *Living Well* flyers in grocery bags during a designated time period before an upcoming workshop.
- ★ Send an email to your entire organization and partner organization to get the word out about an upcoming workshop.



# Face-to-Face Presentations

---

## *Talking Points: Conveying the Benefits of Living Well*

Giving face-to-face presentations to potential participants and partners is an essential marketing strategy to generate initial awareness about *Living Well*. Tailoring your message during these presentations will help catch your audience's attention and allow them to relate to your key points.

For example, you could emphasize how *Living Well* can help with fatigue and managing medications when you are talking to a cancer support group, or the practical ways participants learn to deal with pain when you are talking to people with arthritis.

Additionally, when talking with a potential partner of *Living Well*, share the benefits of the program that are most applicable to its organizational mission or the clients it serves. The following examples of potential partners and suggested Talking Points for each can help you appropriately shape your presentation. Also see *Case for Support: Statistics of Chronic Diseases* [\[Appendix A-1\]](#) for more talking points. After you have held your first workshop, you will be able to use your own participants' testimonials to strengthen your case.

### **Talking Points for Nonprofit Social Service Organizations**

Social service organizations generally have individual or community well-being at the core of their mission. Sharing a strong testimonial from a past participant will be helpful with these types of organizations, as they often rely on success stories to secure their own funding and convey a clear message about the important work they do.

#### *Living Well:*

- Can help individuals take control of their health and their lives.
- Has the potential to improve both the individual's health and the health of his or her family.
- Uses a "peer model." This means that individuals who have chronic health conditions are a key part of program delivery.
- Is relatively inexpensive to implement, and is a valued community resource.
- Can help individuals who participate lead longer, healthier, and more productive and satisfying lives.
- Can help people engage more fully in their communities and the things they love to do.
- Can be a helpful complement to the important service your organization provides the community.

## Talking Points for Hospitals, Clinics, and Health Plans

Hospitals and clinics will also be interested in participant testimonials. Note that they will be more compelled by those that relate more directly to a health condition and/or experience with the health care system. (See also: “Engaging Health Care Providers,” on pages 19-22.)

### *Living Well:*

- Is free or low-cost
- Is help in convenient location at convenient time
- Is credible – has been scientifically researched and proven to work.
- Can help reduce hospitalizations and outpatient visits.
- Can help patients better manage their medications.
- Can help patients communicate more effectively with their health care team.
- Can help patients use the health care system more appropriately.
- Can help patients put lifestyle changes associated with their chronic health condition in to place, so they are better able to manage their conditions when they are outside of the health care setting.
- Does not interfere with any medical treatments.
- Is an excellent complement to disease education because it can help patients form personal action plans.
- Helps patients improve fatigue, self-reported general health, and their overall self-efficacy.
- Is appropriate for patients with multiple chronic health conditions. In fact, the average participant in *Living Well* has at least three chronic health conditions.

## Talking Points for Local Health Departments

Some local health departments provide health services, and some even provide primary care services. Therefore, in addition to the following, many of the Talking Points provided under the Hospitals, Clinics, and Health Plans categories will also apply to local health departments.

### *Living Well:*

- Can reach some of our most vulnerable community members: people living with ongoing health conditions.
- Can be used in a variety of settings for many different populations. It is appropriate for many groups of people.
- Can help prevent the worsening of chronic conditions for people who already have them.
- Is relatively inexpensive to implement, and is a valued community resource.

## Talking Points for **Aging Service Organizations**

Aging service organizations have a strong stake in the health and well-being of older adults, so it is best if your testimonial comes from an older adult participant.

### *Living Well:*

- Can help older adults maintain control of their health, regardless of the conditions they are faced with.
- Can help older adults improve their quality of life and do the things they love to do.
- Can help older adults engage more fully in their communities.
- Is suitable in community settings, including senior centers, senior housing, retirement communities, and assisted living facilities.
- Can help reduce hospitalizations and outpatient visits.
- Can help people living with chronic health conditions remain in their own homes.
- Can help older adults build a community, by providing an outlet for meeting with other community members on a regular basis.

## Talking Points for **Employers**

Employers, whether a local business or the human resource leadership of one of the partner organizations listed above, are concerned with the health of their employees. Some local businesses may also be interested in building up public relations and a relationship with the community in general.

### *Living Well:*

- Helps to improve work attendance and productivity.
- Has been shown to improve the health and quality of life of participants.
- Has been shown to reduce hospitalizations and outpatient visits, which can save on insurance premiums.
- Is an inexpensive, valued community resource.
- Can help participants better engage in their lives and do the things they love to do every day.

## “Elevator Speeches”

An “elevator speech” is a succinct description of the workshop that can be delivered in the time it takes for an elevator ride – about 30 seconds. It should be brief (100 – 130 words) and contain a clear message. It can be useful in promoting your workshop, especially on the first or “cold” call to a potential partner or during a short encounter with a potential participant. Elevator speeches can be used in combination with material handouts, like a brochure, flyer, or poster.

*Developing an elevator speech:*

<http://www.philanthropyjournal.org/resources/marketingcommunications/developing-elevator-speech>

### *Sample Elevator Speech for Potential Participants*

*Living Well with Chronic Conditions* is a workshop for people with lifelong health conditions, such as heart disease, arthritis, and diabetes.

The six weekly sessions cover topics like pain and fatigue, eating well, fun ways to get active, and tips for talking with your doctor and family about your health. It’s also a great way to meet other people dealing with similar health issues.

**Living Well works:** People who take the workshop have less pain, more energy, and fewer hospitalizations.

*Living Well* is supported by [insert your organization’s name] and the Wisconsin Institute for Healthy Aging. It is led by trained leaders, at least one of whom has an ongoing health condition him or herself.

(If time allows) People really love the workshops. For example, [insert a quick story about a real person who took the class and has seen real benefit, e.g. reduced the number of medications they were taking, lost weight, is now a spokesperson for the workshops, etc. ].

You can find a workshop near you on our website, [www.wihealthyaging.org](http://www.wihealthyaging.org), or by calling [phone number] OR A workshop is starting in [city] on [date].

### *Sample Elevator Speech for Potential Partners*

*Living Well with Chronic Conditions* is a workshop for people with lifelong health conditions, such as heart disease, arthritis, and diabetes.

It covers topics such as:

Dealing with pain and fatigue

Healthy eating and exercise choices  
Effective communication with healthcare providers  
Evaluating new treatment options

Research from Stanford University has shown that it works: Participants have less pain, more energy, and fewer hospitalizations.

Most importantly, the workshop helps participants gain control of their own lives through manageable action plans and support from their peers.

*Note: Conclude with an “ask” (what you want the listener to do) — For example: Can we meet to explore how we might work together to help your patients/members/clients? Would you be willing to offer a workshop at your location to make it convenient for your patients/members/clients? Could you hang this poster? Could you recommend the program to your clients or patients?*

## ***“Selling” Living Well Presentation***

This presentation emphasizes the personal story of someone who took and benefited from a *Living Well* workshop.

Workshop leaders serve as the presenter. After an initial workshop, past participants can also serve as volunteer ambassadors. Often the presentation is used when the *Living Well* representative is a guest speaker at some event or meeting (e.g. a Diabetes Support Group, a Rotary Club meeting). You can adapt the presentation depending on how long you have to speak. You can also choose to include a few activities from the “Session Zero” presentation, “You Can Break the Symptom Cycle!” It is most effective to use when your workshop is scheduled in the upcoming 2-4 weeks.

**The main objective of this presentation is to inspire people to sign up for *Living Well*.** The audience should feel connected to the speaker and energized to learn more about, and ultimately sign up for, the workshop.

If a past participant serving as a volunteer ambassador is giving the presentation, ideally he or she should possess some of these characteristics:

- ✓ *Experience with a chronic disease.* The presenter should either have an ongoing health condition him or herself, or have experience taking care of a loved one with a chronic disease. The audience should be able to relate to their story in some way.
- ✓ *Enthusiasm.* The presenter should be passionate about *Living Well* and be able to convey this in his or her presentation.
- ✓ *Experience with Self-Management.* Besides having been a past participant of *Living Well*, the presenter needs a sound understanding of what it means to self-manage, and how it can help better one’s life.
- ✓ *Previous Involvement in the Community.* In addition to being an effective public speaker, the best ambassador is someone with previous experience working with groups and engaging community members (e.g. an aquatic class instructor, Kiwanis member, retired teacher).
- ✓ *Availability.* An ambassador should be able to devote a few hours a week to outreach events and talks, especially in the 2-4 weeks prior to a scheduled workshop.

For an example of this style of presentation, view videos of *Living Well* Master Trainer Harvey Padek on youtube:

<http://www.youtube.com/watch?v=CujTuDFdaEw>

[http://www.youtube.com/watch?v=WHpB4PlpHas&feature=watch\\_response](http://www.youtube.com/watch?v=WHpB4PlpHas&feature=watch_response)

The **“Selling” Living Well Presentation Guide** (available on the WIHA website) can also help you develop your own presentation.

## ***“Session Zero” Presentation***

Problems with participant recruitment and retention are often attributed to participants' misunderstanding of what *Living Well* workshops are about when they sign up.

**The main objective of this presentation is to give your target audience a real taste of what *Living Well* is all about and to recruit participants for the actual workshop.**

The entire *Session Zero* presentation lasts one hour and is a “sample” of the *Living Well* workshop. You can choose to use just one or two activities depending on the time allotted for your presentation, as well as incorporate those activities into a “**Selling**” *Living Well* presentation.

It can be scheduled with organized groups or communities, such as support groups, retirement facilities, faith-based organizations, or other settings where groups already meet at a designated time. Additionally, presentations can be scheduled with “drop-in” attendance, open to a specified group of people (e.g. members of an insurance plan) or the general public. *Session Zero* can help recruit participants who want to learn more about self-management after hearing the presentation.

Another way to use *Session Zero* presentations is in educating other aging and health professionals (such as ADRC staff members or a group of pharmacists) about how *Living Well* works. The goal is to gain their assistance in promoting the workshops by recommending it to their clients.

The ***Session Zero Presentation Guide*** [\[Appendix A-2\]](#) and “**You Can Break the Symptom Cycle!**” (available on the WIHA website) can help you in preparing for your own *Session Zero* presentation.

# Creating a Person-to-Person Referral Program ★ ★ ★

---

Some of the best marketing strategies focus on encouraging current or past participants to help create a person-to-person and “word-of-mouth” referral program. Here are some ideas on how to engage your participants to help spread the word about your *Living Well* workshop.

## *“Tell a Friend” Postcard*

***For use at your last session.*** Ask participants to help you promote your next workshop by sending a postcard to a friend who may also enjoy and benefit from *Living Well*. Postcards can either have a pre-written message or be blank for participants to fill out. Consider having different styles to choose from.

Questions and prompts for participants if they decide to write their own message:

- Why did they take *Living Well*?
- What did they learn?
- What was their favorite part?
- Why do they recommend it?

Examples:

- *“Living Well is a six-week workshop to learn how to better self-manage your life.”*
- *“I learned ways to deal with pain and fatigue, about better nutrition and exercise, and how to talk to my doctor.”*
- *“The class was fun, interesting, and educational.”*

***Information about how and where to find out more about Living Well workshops should be included as well.***

Options when sending the postcards:

- ❖ Give participants a pre-stamped postcard to fill out during class. (They may need to take it home to write in the mailing address.) On the postcard include information about where to find out about future workshops.
- ❖ Ask participants to fill out postcards. Explain that you will send them out when another workshop is scheduled. (You may need to ask them to bring



in addresses ahead of time.) On the postcard leave a blank space to fill in workshop dates and times when you are ready to send.

*Don't have a workshop planned for a while? Consider asking participants to send a letter to their doctor telling the doctor how much they benefitted from the workshop. [Appendix C-6]*

## ***“Tell a Friend” Letter***

***To mail to previous participants before an upcoming workshop.*** Enclose brochures so that they may pass them along to people who may also be interested in taking *Living Well*. [Appendix B-2]

## ***Getting a Picture or Testimonial***

***Ask for a testimonial and/or picture from your participants at the end of the workshop.*** These are useful when advertising your next workshop. Additionally, the same newspaper you previously submitted media releases to may accept another story or a different angle at a later stage. Pictures and testimonials from diverse age groups are particularly helpful.

Ask participants for feedback on how the workshop has affected their lives. If you have their email addresses, consider sending requests for testimonials to them after the workshop so they have more time to think about their answers.

If participants approach you with positive feedback, take that opportunity to ask them to provide a testimonial. Or write down what they say and get permission to use it. Ask if you can use their first name or initials. Otherwise use “past participant.” [Appendix B-1]

## ***Volunteer Ambassadors***

Consider inviting past participants to volunteer to conduct word-of-mouth marketing efforts in the community. (*See “Face-to-face presentations.”*) Also, ask participants if they belong to civic clubs, hobby or interest groups, senior centers, churches, or other organizations that might be interested in having a program coordinator or workshop leader speak about their program. Ask them to join you at the presentation and provide a testimonial.

## *Wristbands*

***To give to completers of your workshop.*** Wristbands say “I’M LIVING WELL” on one side, and “www.wihealthyaging.org” on the other. Ask participants to wear the wristband at least three times in public places to help promote the workshops.

*Additionally, suggest that wristbands serve as a good reminder for participant action plans.*

To obtain wristbands for your workshops, contact WIHA at [info@wihealthyaging.org](mailto:info@wihealthyaging.org) or (608) 243-5690.



# Engaging Health Care Providers ★★

---

One of the single most effective ways proven to recruit participants is through their health care providers. People are more likely to take the workshop if it is recommended to them by a health care professional. Engaging health care providers can be a challenging process, but keep at it because it can help to consistently fill workshops in your area.

There are several key parts in creating a cooperative relationship:

1. **Getting in the door.** How do you reach health care providers and interest them in *Living Well*?
2. **Creating a recommendation system.** Once convinced and ready to recommend to their patients, how do you create a system that is easy, automatic, and integrated into the workflow of the health care provider?
3. **Following up.** How do you confirm to the provider that their recommendation to a patient is effective in the patient registering for, and ultimately benefiting from, the workshop?

## *Getting in the Door of the Health Care Provider*

**Research the health care provider.**

**Identify who can do the outreach, which upcoming workshop(s) you are promoting, and what provider groups are nearby.** Partner with your Leader Coach or Local Coordinator. Strategize on who will do the personal contacts with providers and other follow-up tasks (e.g. phone calls, mailings).

**Know the provider's mission and vision.** Most are committed to preventive care and community wellness through education. Be prepared to speak to how *Living Well* can support their mission or vision with the challenges their patients face.

**Investigate how the provider engages in education to their patients.** Keep this in mind as you prepare recommendation materials for the provider to give to their patient.

- Face-to-face?
- Internal media system on local network?
- Handouts?

## 2. Be prepared to explain *Living Well*.

Many health care providers have not heard of *Living Well* and will first need an introduction to what the program is, that it was developed by and researched at Stanford University, where it is available in the community, and who is teaching the workshops before they begin to recommend it to their patients. Use the **Key Talking Points: The “Three C’s”** [Appendix C-2] and **Case for Support: Health Care Providers** [Appendix C-3] documents when preparing to speak with providers. Also see “Talking Points for Hospitals, Clinics, and Health Plans (*Face-to-Face Presentations*)” for points to emphasize. Preparing a “**Program Brief**” [Appendix C-4] to leave with the provider will also be useful for their own reference.

## 3. Know your potential key contacts.

The best approach to get in the door of a health care provider is to identify a champion. The champion should be passionate about the workshop and be able to share that passion with others. The champion can be anyone in the practice who believes in the program and can dedicate some time to making it a success. Champions have been physicians, physician assistants, nurses, care managers, social workers, or health educators.

If you are already working with your hospital, ask your contact who might be the best person for a conversation about broader involvement with *Living Well* and request an introduction. In larger hospitals, the managers of disease-specific programs such as diabetes clinics and cardiac or pulmonary rehabilitation could be helpful contacts. In smaller hospitals, these functions may be grouped together into a single health education unit. Discharge planners and employee wellness coordinators could also be good contacts. Within hospital administration, supporters may be found in the marketing department, community benefits office, volunteer office, chaplain’s office, or charitable foundation.

## 4. Contact a provider and follow-up, follow-up, follow-up.

Sending an informational letter to your potential contacts may be a good first step in building a relationship [Appendix C-1]. Based on what clinic you’re working with, consider addressing the letter to the office manager or administrator, who could bring it to the attention of providers as well as front desk and other staff members. Because clinics are very busy and receive a lot of mail, consider dropping off the letter by hand and following up by phone or in person.

Also consider asking current participants to send a letter to their physician [Appendix C-6] with a cover letter that explains the program. [Appendix C-5] This could also be a good way to introduce the program to providers.

Face-to-face presentations and personal contacts are ultimately the critical outreach strategies to use. It takes time to get your foot in the door and meet with a provider, but consistent and ongoing outreach will help you get there. Here are some tips:

- **Set-up a personal visit.**
  - Phone or drop-in to request an appointment.
  - Meet providers at their convenience.
  - Ask to schedule a short meeting for a presentation with your contacts (e.g. during lunch break, over breakfast).
  - Ask to conduct a presentation at one of their meetings or conferences (e.g. Nurse Practitioners' monthly meeting).
  
- **Be flexible in your approach.**
  - 2 minute hallway conversation or 15 minute staff meeting presentation – be prepared for either! And be appreciative of their time, even when the 30 minutes you had expected and planned for turns out to be just the 2 minutes in the hallway. Your goal in that first encounter is simply to be able to have a second one. You are developing a relationship. It takes time.
  
- **Keep it simple and be prepared.**
  - Have research on program facts and efficacy readily available.
  - Be prepared to offer ways the provider can easily recommend the program (e.g. prescription pad, recommendation forms, brochures)
  
- **Track outreach contacts.**
  - Combine in-person visits with repeated follow-up (e.g. more brochures and flyers, phone calls, email, letters).

## ***Creating a Health Care Provider Recommendation System***

Once health care providers are convinced and ready to recommend the program, it will be important to help create a recommendation system that is easy, automatic, and integrated into the organization's regular work flow. Be prepared to know what you can potentially offer the practice to make this happen. The following are a few ideas of how to do this:

***Leave providers with brochures and flyers to hand out to their patients.*** This is a good start to ease providers in to recommending the program.

***Provide prescription pads and recommendation forms.*** Offer providers prescription pad recommendation forms [Appendix C-8] to fill out to give to their patients. Also offer recommendation forms that they can complete and send over to the sponsoring agency of *Living Well* via mail or confidential fax. [Appendix C-7] These can ensure that patients

who are recommended for the program receive follow-up and are able to register for the next workshop.

***Work with a health care provider for targeted outreach.*** If your champion is a physician or nurse practitioner, consider working with them to utilize electronic medical records and send personalized letters to patients diagnosed with one or more chronic conditions. The letter can introduce *Living Well* and encourages the patient to consider enrolling in an upcoming workshop. A letter template can be drafted in the provider's name and voice with his or her approval, then quickly and easily personalized through a mail merge and sent to each patient's home.

## ***Following Up***

Health care providers are more likely to provide ongoing recommendations to the program when they are notified that their patient actually took the workshop and benefited from it in some way due to the provider's recommendation.

Ask participants to send a letter to their provider **[Appendix C-6]** at the end of the workshop to inform the provider what impact the *Living Well* workshop had.

Track recommendations from participants and call to thank the provider for frequent recommendations.

# Marketing in the Media ★

---

## *Using a Public Service Announcement (PSA)*

Contact your local radio station and ask to speak to the PSA or community affairs director. Give that person your “elevator speech,” stressing the prevalence of chronic disease in your community. Explain the positive benefits of the *Living Well with Chronic Conditions* workshop, and ask him or her to read your PSA on the air regularly.

If possible, have a past participant read the PSA. You can then include parts of their experience with a chronic condition and *Living Well* in the announcement.

Invite the radio station to say “brought to you by [station].” Send a “thank you” letter to the station, which will remind the PSA director of your “ask,” help strengthen your relationship, and may lead that person to support you again in the future.

### *Sample PSA Script (30 seconds)*

Do you have a chronic health condition like diabetes, arthritis, high blood pressure, heart disease, or depression? Put life back in your life! Consider a *Living Well with Chronic Conditions Workshop*, now available in [COUNTY/CITY], beginning [DATE] and meeting once a week for six weeks. Workshops provide tips on reducing pain and fatigue, eating better, making exercise fun, talking with your doctor, and more. For details visit [www.wihealthyaging.org](http://www.wihealthyaging.org) or call [PHONE NUMBER]. That’s [REPEAT NUMBER]. *Living Well with Chronic Conditions* — your path to less pain, more energy, and living the life you want. A message from [AGENCY] and [RADIO STATION].

## Submitting a Media Release

The following steps are an overview of how to “pitch” a story to the media. You can use the sample media releases [\[Appendix D-2\]](#) to get started.

1. **Customize the media release.** Use a compelling headline and keep pertinent information in the first paragraph. Add information that is specific to your county. Gather quotes from participants.
2. **Ensure your contact information is clear and correct.** Give as much information as possible – point of contact, phone number, physical address, email address, fax number, and website.
3. **Make a list of possible people to send your release to, including key contacts from local newspapers, magazines, television stations, radio stations, and trade and newsletter publications.** Identify editors and reporters who would be most interested in what you have to say. Find specific names and departments; call ahead if necessary to find this information. Sending it to a specific journalist or editor will ensure a better chance of receiving prompt attention.
4. **Research media outlets to find out whether your specific contacts prefer to receive news releases by fax, mail, or e-mail.** Prepare your press release submission in the necessary hard-copy or electronic format.
5. **Send electronic releases with interesting and to-the-point subject lines.** Send to one person at a time or blind carbon copy (BCC) recipients to make the news release submission more personal. Type or paste the wording directly into the body of the e-mail; many journalists delete e-mails with attachments as they take too much time and often carry viruses.
6. **Avoid sending unsolicited photos electronically.** Photos could clog an inbox or get sent directly to junk mail. Instead simply note that photos are available upon request. Add complete captions to any photos that are requested.
7. **Follow up with a phone call.** Ask if the recipient has received the release and let him or her know you are available for interviews or to provide more information. Emphasize the importance of this story to the media’s audience and offer some good stories to tell. For example:



- *Personality Profile:* Identify a local leader who is passionate about the workshop and has experienced benefits firsthand.
- *Health Information:* Keep an eye on the media and watch for articles that are relevant to the program. Use these as a hook for sharing your information. *For example,* if a national study is published about the benefits exercise has on a chronic condition, use this to show the national, big-picture trend and provide information about how the *Living Well* workshop can help participants learn more about and develop plans to increase exercise.

***After your first workshop:***

- *Personality Profile:* Identify a local workshop participant whose well-being has dramatically improved as a result of the workshop. Ask if you can share his or her story with the media. In addition to individuals, look for couples, siblings, groups of friends and others who might make a good story and illustrate the social nature of the workshops.

8. ***Once the article runs, share it through your community channels and with your community partners.***
9. ***Send the reporters thank-you emails.*** This will give you an opportunity to include additional information that may be helpful for them and remind them that you are a resource.

**Other tips:**

- Avoid sending a media release that doesn't say anything interesting or timely. Your release should announce an event (e.g. an upcoming workshop).
- Don't push your agenda to those who don't want it. Avoid sending your release to the same person more than once unless asked to re-send it.
- Brevity is allowed; in fact it is encouraged and rewarded. It shows you respect the time of busy editors and reporters. If they require more information, they will ask.
- When deciding what quotes to use in your media release, choose quotes that people will easily understand. People of various education and socioeconomic backgrounds will likely read a media release so the quotes need to be as clear and concise as possible.
- When possible, write the media release on organization letterhead.
- Because many reporters work after regular business hours, consider including your home or cell phone number. This is particularly important if the information is for immediate release.

## Submitting Notices for a Community Calendar

Calendar listings in local media outlets may be helpful for promoting a workshop.

Every media outlet has a different process for submitting information to its calendar. Scan the website first to see if it lists “Events.” Next, click on “Contact Us.” Often, the email address for submissions will be listed here. If not, you can send an email to the general email address with “Calendar/Event Listing” in the subject line. The newspaper may also have information on how to submit a calendar listing.

Most outlets have guidelines for submitting calendar listings.

Common information includes:

- Event title
- Date, day, and time of event
- Location
- Address
- City and ZIP code
- Phone number
- Website
- Cost
- How people can register
- Brief description of the workshop

### Sample Notices for a Community Calendar

#### **Sample 1:**

**Take Charge, Feel Better!** *“I was tired. My pain was my boss. It was always telling me what I couldn’t do. Living Well workshops put me back in charge. Now I have the energy to do the things that matter. I put life back in my life.”* A free, six-week *Living Well* workshop for people with ongoing health conditions, such as arthritis, diabetes, high blood pressure, heart disease, chronic pain, or depression, will be offered at [LOCATION] from [DATE, TIMES]. To register or to receive more information, call [NUMBER] or visit [www.wihealthyaging.org](http://www.wihealthyaging.org).

#### **Sample 2:**

Put life back in your life by participating in a *Living Well* workshop! If you or someone you care about has a chronic condition such as diabetes, arthritis, HIV/AIDS, high blood pressure, depression, heart disease, chronic pain, anxiety, multiple sclerosis, or fibromyalgia, these workshops can help you take charge of your life.

You’ll get the support you need, find practical ways to deal with pain and fatigue, discover better nutrition and exercise choices, understand new treatment choices and learn better ways to talk with your doctor and family about your health.

To register or to receive more information, [CONTACT INFO].

# **Appendix A:**

## **Face-to-Face Presentations**

---



## *Case for Support – Statistics on Chronic Diseases*

### *National and Wisconsin*

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.

Over 80 percent of the \$2 trillion spent on health care in the United States each year goes toward treatment of chronic diseases.

Half of all Americans have at least one chronic disease, and seven in ten deaths each year are from chronic diseases.

#### **Heart Disease and Stroke**

Heart disease and stroke, the first and third leading causes of death in the United States, respectively, are the most common cardiovascular diseases.

- Heart disease accounted for 25% of deaths in Wisconsin in 2005, while stroke caused 6% of deaths.
- In 2007, 26% of adults in Wisconsin reported having high blood pressure (hypertension) and 35% of those screened reported having high blood cholesterol, which puts them at greater risk for developing heart disease and stroke.

## **Diabetes**

In 2005, diabetes was the sixth leading cause of death in the U.S. Likely to be underreported as a cause of death, the risk of death among people with diabetes is about twice that of people without diabetes of similar age.

- 1,276 adults in Wisconsin died from diabetes mellitus in 2005.
- In 2007, 6% of adults in Wisconsin reported being diagnosed with non-pregnancy related diabetes.
- 25% of Medicare beneficiaries have diabetes.

## **Arthritis**

Arthritis is the most common cause of disability in the U.S., affecting more than 46 million Americans.

- In 2007, 28% of adults in Wisconsin reported being diagnosed with arthritis.

## **Cancer**

Cancer is the second leading cause of death in the United States, accounting for almost one in every four deaths.

- 23% of all deaths in Wisconsin in 2005 were due to cancer.
- The American Cancer Society estimates that 28,130 new cases of cancer were diagnosed in Wisconsin in 2007, including 3,090 new cases of colorectal cancer and 3,340 new cases of breast cancer in women.

(Taken from: <http://www.cdc.gov/chronicdisease/overview/index.htm>)

*For more Wisconsin statistics and other great Talking Points, see:*

<http://www.dhs.wisconsin.gov/hw2020/pdf/chronicdisease.pdf>

# **“Session Zero”**

## **Presentation Guide**

**Note:** This guide is designed to be used with the “YOU Can Break the Symptom Cycle!” presentation, available on LIVING WELL LEADER pages of [www.wihealthyaging.org](http://www.wihealthyaging.org)

### **1. Introduce yourself.**

- ✓ Explain your involvement with the program (e.g. Leader, sponsoring agency)
- ✓ Briefly share why and how you got involved with *Living Well*.
  - *What is your chronic condition?*
  - *How did you hear about the program?*
  - *What did you learn?*
  - *How did it make a positive difference in your life?*

### **2. Give a few details about *Living Well*.**

- ✓ Start by involving the group with a few questions.
  - *“How many of you have ever had trouble dealing with pain or fatigue?”*
  - *“How many have trouble doing things you used to enjoy because of a chronic condition, or are worried about your future?”*
- ✓ Consider sharing the following or similar points:
  - *“Living Well is a six-week program to provide a framework for individuals with chronic conditions to learn to feel better, be in control of their health, and do the things they want to do in life.”*
  - *“When we have any type of a chronic condition or challenge to our physical or mental health, we are faced with new challenges, limitations, unfamiliar circumstances, and maybe new routines that include more medical visits, medications, emotions, and issues in everyday living.”*
  - *“The Living Well program is a wonderful opportunity to help deal with all that having a chronic condition hands us, no matter what the condition may be.”*
  - *“Living Well is very interactive, and the class participants get information, learn new skills, and share and learn from each other.”*

### **3. Introduce the *Session Zero* Presentation.**

- ✓ Explain that this is a sample of an actual workshop session.
  - *“Because this workshop is very different than most other health promotion and disease management programs you may have*

attended in the past, I would like to share some of its main activities and answer any questions you may have.”

#### **4. Do the presentation.** (See *“YOU Can Break the Symptom Cycle!”*)

(Available on LIVING WELL Leader pages of [www.wihealthyaging.org](http://www.wihealthyaging.org))

- ✓ *Note: The whole presentation takes one hour. Depending on your audience and the time allotted, you can choose to do some activities and leave out others.*

#### **5. Sell the program.**

- ✓ Share the evidence found by research done by Stanford.
  - Increased involvement and participating in activities they once enjoyed but gave up.
  - Improved ability to manage pain, fatigue, and other symptoms
  - Fewer trips to the ER, fewer hospitalizations
- ✓ Emphasize how the workshop can make a difference.
  - *“Think for a moment: If you could improve your ability to deal with your emotions on the “tough days”... approach challenges a bit more positively... understand more about your healthcare... and have more confidence in your health... wouldn’t that make a difference in your life?”*
- ✓ Share how it has made a difference for past participants.
  - *“Taking this workshop has taught me to look at life and all I do in a more positive way.”*
  - *“This workshop helped me organize my thoughts and actions to go forward and better manage my health condition.”*

#### **6. Answer any questions and give directions on how to register for the upcoming workshop.**

- ✓ Dates, Time, and Location
- ✓ Bring a sign-up sheet for the next workshop and a “class ticket” for those who sign up today. Encourage people to sign up today by explaining that the workshop has limited spots.
  - *“We only have eight spots left for the workshop coming up this month. Sign up now to get a “ticket” to guarantee your place and get one step closer to getting your life back!”*
- ✓ For those who don’t sign up that day, offer brochures or flyers and have a “For More Information” sheet so you can contact them in a few days, or when there is another workshop scheduled.

- ✓ Be sure to call all of the individuals who signed up within a day or two, thank them for signing up, tell them you think they have made a great decision and remind them about the location and the date and time of the first session.
- ✓ *“There are two ways of moving forward... either we can allow our illness to manage us and our lives, or we can learn to manage it and get our life back!”*

**See Template for the Presentation Guide on the Living Well Leader pages at [www.wihealthyaging.org](http://www.wihealthyaging.org)**





# Living Well Interest Sheet

**[Workshop Dates, Times, & Location]**

<b>Name</b>	<b>Phone Number and/or Email</b>	<i><b>Check to register</b></i>	<i><b>Check for more information</b></i>

## *Sample "Ticket" For Workshop Registration*

*Congratulations!*



You have reserved a seat for the upcoming *Living Well* workshop.

**Dates:**

**Time:**

**Location:**

*See you there!*

[AGENCY CONTACT INFO]

# **Appendix B:**

## **Creating a Person-to-Person Referral Program**

---



# Share Your Story: Participant Testimonial

## *Living Well with Chronic Conditions*

We would like to be able to share your story to help others living with chronic conditions learn about the Living Well workshops. (All questions are optional.)

Name \_\_\_\_\_

Do we have permission to use your first name?     Yes    No

E-mail \_\_\_\_\_

Phone \_\_\_\_\_

Signature \_\_\_\_\_



Why did you decide to take the *Living Well* workshop?

Now that you have completed the *Living Well* workshop, how has it helped you manage your chronic condition?

What did you hope to gain from taking this workshop?

What differences do you see in your life now? (For example, in your physical health, emotional health, mental health? Social life changes?)

If you could describe Living Well in one sentence, or a few words, what would you say?

# Sample “Tell a Friend” Letter

[USE EITHER YOUR AGENCY LETTERHEAD OR *Living Well* LETTERHEAD]

[MONTH, YEAR]

Dear [XXX]:

Thank you again for participating in the *Living Well* workshop held by [AGENCY] last [SEASON, e.g. spring]. I hope you found it interesting and educational, and continue to see the benefits of using what you learned.

[AGENCY] will be offering *Living Well* again this upcoming [DATE]. I am writing to ask you to help promote our next *Living Well* by passing along these brochures to friends or neighbors who may also be interested in taking the workshop.

As a reminder, the workshop:

- [Has a low registration fee of \$XX. Scholarships are available.] OR [Has free registration!]
- Is held for 2 ½ hours each week for six weeks.
- Is offered in a convenient location.
- Helps participants get the support they need, find practical ways to deal with pain and fatigue, discover better nutrition and exercise choices, and learn better ways to talk to their doctor and family about their health.

Thank you for helping to spread the word about this upcoming workshop. If you have any questions or would like more brochures, feel free to call me at [NUMBER]. I hope you are *Living Well!*

Kind regards,

[NAME]

[TITLE]

[AGENCY]

# Sample Recruitment Letter from Community Leader

[DATE]

[NAME]

[ADDRESS]

[CITY, STATE, ZIP]

Dear [NAME],

On behalf of [community group, church, organization, club, etc.], I would like to tell you about the *Living Well* program.

The *Living Well* workshop is for adults with diabetes, arthritis, high blood pressure, heart disease, depression, chronic pain, anxiety, or any other ongoing health condition. People who attend the workshop say they get relief from their pain and fatigue, enjoy more energy to do the things that matter, feel calmer, and are more confident about their life.

The *Living Well* workshop is taught by trained peer instructors and meets once each week for six weeks. By learning how to eat well, relax, communicate with your family and doctor about your health, and manage your pain, you will be able to take charge of your life and feel better.

The next *Living Well* workshop will be held at [location, date, and time]. The cost to attend the workshop is [cost]. To register for the workshop, [contact info]. The class size is limited to 15 people so please register as soon as possible to ensure a spot.

If you would like more information about the *Living Well* workshops, please visit [www.wihealthyaging.org](http://www.wihealthyaging.org) or call [number]. We hope you will join us and “*Put Life Back in Your Life!*”

Sincerely,

[NAME]

# **Appendix C:**

## **Engaging Health Care Providers**

---



# Sample Informational Letter to Health Care Providers

[DATE]

[NAME]

[ADDRESS]

[CITY, STATE, ZIP]

Dear [NAME OF CLINIC/PROVIDER],

I am a [NAME OF POSITION] of the *Living Well with Chronic Conditions* (“Living Well”) workshop offered in [CITY/COUNTY]. *Living Well* is an evidence-based program developed by Stanford University and supported by [SPONSORING AGENCY] in coordination with the Wisconsin Institute for Healthy Aging. It helps people with a chronic condition (e.g., arthritis, diabetes, heart disease, stroke, cancer) learn how to self-manage their disease and maintain a better quality of life.

*Living Well* workshops take place over six weeks, with one 2.5-hour session held each week, and are low-cost or free. They are hosted by community organizations and taught by two trained leaders, at least one of whom has a chronic condition. Participants will:

- Receive support from trained leaders and other workshop participants.
- Learn practical ways to manage their pain and fatigue.
- Learn about nutrition and exercise choices.
- Understand new treatment choices.
- Learn better ways to communicate with doctors and family members.

Nationally, 80 percent of older adults have at least one chronic condition and half have at least two. Learning how to self-manage a chronic disease is especially important since chronic diseases are responsible for seven out of 10 deaths every year. Research has shown that at the end of the six-week workshop, participants have less pain, more energy, and fewer hospitalizations.

Would you consider referring patients to the *Living Well* program? Providing support for self-management is an important aspect of patient-centered care. *Living Well* does not conflict with a patient’s existing treatments or programs and is designed to enhance their treatment, complementing existing disease management programs and provider relationships. Your support of the program makes it possible for individuals to live well, for communities to embrace health and disease prevention, and to reduce the demand on our health care system.

Workshops are open to anyone, of any age, with a long-term health condition. *Living Well* is also appropriate for people who have multiple chronic health conditions. Workshop information can be found at [www.wihealthyaging.org](http://www.wihealthyaging.org). Also please contact me with any questions at [CONTACT INFO].

[Include brochures]

Thank you,

[NAME]



## **Key Talking Points for Health Care Providers: “The Three C’s”**

Providers are primarily interested in learning the “three C’s” of the program (Cost, Convenience, and Credibility) before they agree to support and recommend it. Be sure to emphasize these points when talking with them about *Living Well*, whether it is a 3 minute conversation or 15-minute presentation.

### **Cost:**

- Free or low-cost for participants.
- Only asking the provider to recommend the program to their patients. There are no direct costs to their healthcare organization.
- NOT a commercial or for-profit service.

### **Convenience:**

- Convenient location in the community that is easily accessible for participants. (Share where your workshops are held.)
- Convenient time of day.
- Again, free or low-cost for participants.
- Does not conflict with existing programs or treatment. Designed to enhance regular treatment and disease-specific education.

### **Credibility:**

- The program was developed and tested by the School of Medicine at Stanford University and data regarding its efficacy has been published. (Consider giving them a copy of the scientific article.)
- Randomized, controlled trial of 1,000 Living Well participants found that participants:
  - Had improvements in self-reported health
  - Increased ability to participate in social activities
  - Were more active
  - Had greater self-confidence
  - Had more energy and less fatigue
  - Spent fewer days in the hospital
  - Had fewer outpatient and ER visits

# *Case for Support: Health Care Providers*

Your case for support helps you clearly communicate **what** Living Well is, **why** it matters, and **what** impact it has. Include these or similar talking points when addressing health care providers.

## **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 a least one chronic disease, and seven in ten deaths each year are from chronic diseases.

In Wisconsin:

- Heart disease accounted for 25% of deaths in 2005.
- 1,276 adults died from diabetes in 2005.
- 28% of adults in Wisconsin reported being diagnosed with arthritis in 2007.

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

Slowly we are moving away from a health care system focused on sickness and disease to one focused on wellness and prevention. In the meantime, for people who already have chronic conditions, and for those with conditions we can't entirely prevent, we must help people live better and better cope with their health conditions.

## **A Solution: Helping people live well with chronic conditions.**

*Living Well with Chronic Conditions* is a workshop given two and half hours, once a week, for six weeks, in community settings such as senior centers, churches, libraries, and hospitals. People with different chronic health problems attend together. Workshops are facilitated by two trained leaders, one or both of whom are non-health professionals who have chronic conditions themselves.

Subjects covered include:

- Techniques to deal with problems such as frustration, fatigue, pain, and isolation
- Appropriate exercise for maintaining and improving strength, flexibility, and endurance
- Appropriate use of medications
- Communicating effectively with family, friends, and health professionals
- Nutrition
- How to evaluate new treatments

It is the process in which the program is taught that makes it highly effective. Classes are highly participative, where mutual support and success build the participants' confidence in their ability to manage their health and maintain active and fulfilling lives.

## **The Impact**

*Living Well* improves the quality of life of participants by helping reduce fatigue and increasing their physical activity and emotional and physical well-being. It helps patients learn how to improve communication with their health care providers and caregivers, which eases patient care both during a hospital stay and care-setting transitions.

Relationships with fellow participants often last well 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 families.

# Program Brief for Health Care Providers

[SPONSORING AGENCY LETTERHEAD/LOGO]



## Living Well with Chronic Conditions (“Living Well”)

Chronic Disease Self-Management Program

*Living Well* is a six-week chronic disease self-management program held for two and a half hours each session. It is held in **convenient locations** in the community, such as [give example of your workshop location]. People with different chronic conditions, as well as those who support them, attend the program. Programs are facilitated by two trained leaders, one or both of whom are non-health professionals with a chronic condition.

### The program covers:

*Problem Solving*  
*Managing emotions*  
*Exercise*  
*Managing Medications*  
*Cognitive symptom management*  
*Communication skills*

*Goal setting*  
*Developing patient/physician*  
*partnerships*  
*Advanced directives*  
*Health eating and more*

[SPONSORING AGENCY] is providing these workshops at **no cost** to participants. Each participant will receive a copy of the book titled *Living a Healthy Life with Chronic Conditions* to use during the program.

The process by which the program is taught is what makes it so effective. Classes are highly participative. Mutual support and success build participants’ confidence in their ability to manage their health and maintain active, fulfilling lives.

The program was developed by Stanford University. It has been tested and evaluated with the following results. \*

### Those who participated in the program, when compared to those who did not:

- Showed significant improvements in exercise, cognitive symptom management, communication with physicians, self-reported general health, health distress, fatigue, disability, and social/role activities and limitations;
- Spent fewer days in the hospital; and
- Had fewer outpatient visits and hospitalizations.

For more information about *Living Well*, visit [www.wihealthyaging.org](http://www.wihealthyaging.org) or contact [CONTACT INFO].

\*Lorig, KG, Sobel DS, Stewart, AL, et al. Evidence suggesting a chronic disease self-management program can improve health status while reducing utilization and costs: A randomized trial. *Medical Care*, 37(1):5-14, 1999.

## Sample Program Cover Letter to Health Care Provider

From: Living Well with Chronic Conditions Program (“Living Well”)

Dear [NAME OF PHYSICIAN],

Attached you will find information from one of your patients who attended the *Living Well* workshop in [NAME OF CITY/COUNTY]. Participants were offered this opportunity to communicate back to you about their progress. I hope you will include this document in their chart.

This free/low-cost and convenient self-management course will not conflict with existing programs or your treatment plans. It is designed to help people learn basic problem-solving skills and set short-term goals that help them manage their health and keep active in their lives. It gives people the confidence and motivation they need to manage the challenges of living with a chronic health condition.

The course was developed by Stanford University and was originally called “Chronic Disease Self-Management Program” (CDSMP). Stanford’s research has shown that people who take the workshop experience a decrease in the number of office and emergency visits and a decrease in hospitalizations, as well as less fatigue and better self-reported general health.

In Wisconsin the program is called “*Living Well with Chronic Conditions*.” We have partnered with the Wisconsin Institute for Healthy Aging to make the workshops more widely available in our community. You can visit [www.wihealthyaging.org](http://www.wihealthyaging.org) for more information about *Living Well* workshops.

Enclosed are a few *Living Well* flyers and brochures. We are regularly scheduling more workshops. The workshops are free/low-cost and each participant receives a copy of the book Living a Healthy Life with Chronic Conditions by Kate Lorig RN, PhD., to use during the program.

If you, your staff, or your patients would like more information please contact me at [EMAIL] or [PHONE NUMBER].

Thank you,

[NAME]  
[TITLE]  
[AGENCY]  
[NUMBER]

# Sample Participant Letter to Healthcare Provider

[AGENCY LETTERHEAD]

---

[AGENCY]

[AGENCY ADDRESS]

[AGENCY CONTACT INFORMATION]

## Living Well with Chronic Conditions Workshop

Date: \_\_\_\_\_

Dear \_\_\_\_\_,

I participated in the *Living Well with Chronic Conditions* Workshop on

\_\_\_\_\_ at \_\_\_\_\_.  
(DATES OF WORKSHOP) (LOCATION OF WORKSHOP)

In this workshop I learned how to cope with frustration and fatigue associated with my chronic health condition. Some of the issues discussed were nutrition, exercise, and appropriate use of medications. I also learned how to set realistic goals for improving my health by using a weekly "action plan" throughout the six week workshop.

During the program, I accomplished:

My current action plan is:

Please file this in my medical record and ask me about it at my next visit.

Thank you.

Sincerely,

NAME

# Sample Provider Recommendation Form

Recommendation to *Living Well*

FAX TO: [CONTACT NAME] [FAX NUMBER]

Criteria: *Living Well* is a 6-week chronic disease self-management program offered by [SPONSORING AGENCY]. It teaches patients and their caregivers how to become an active manager of their ongoing health condition. Patients must have the cognitive ability to participate in some capacity in the class. They are not required to be able to read. This class is designed for adults.

Recommended by: \_\_\_\_\_

Phone #: \_\_\_\_\_ Date of Recommendation: \_\_\_\_\_

Name of Patient: \_\_\_\_\_

PCP/Physician: \_\_\_\_\_

Patient's Address: \_\_\_\_\_

City: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone #: \_\_\_\_\_ Email: \_\_\_\_\_

- Yes, patient was given a brochure or information about the program
- No, patient was NOT given a brochure or information about the program

## Sample Prescription Pad Recommendation Form



**R<sub>x</sub>** *for Living Well*

Congratulations on your decision to better manage your health! To begin, I recommend you enroll in the following **FREE** program:

### Living Well with Chronic Conditions

*A six-week workshop to help you feel better, be in control of your health, and do the things you want to do.*

Today's Date: \_\_\_\_\_

Patient's Name: \_\_\_\_\_

\_\_\_\_\_  
*Health Care Provider Signature*

For a listing of available classes in your area, please call the **[Sponsoring Agency]** at **[XXX-XXX-XXXX]** or visit **www.wihealthyaging.org**



# **Appendix D:**

## **Marketing in the Media**

---



# Sample Newsletter Article

## Contact Information:

[NAME] [AGENCY]

[ADDRESS]

[CITY, STATE ZIP]

[PHONE]

[E-MAIL]

FOR IMMEDIATE RELEASE: [DATE]

## **Living Well Workshops Help [CITY/COUNTY] Residents Live Better with Chronic Conditions** *Sessions help people reduce pain, increase energy, and be in control of their health*

[CITY], WI—For people with chronic health conditions, good medical care is just half of the equation. Equally important is their ability to make healthy decisions, follow their doctor’s recommendations, and take care of their condition.

*Living Well with Chronic Conditions*, a workshop offered in [CITY/COUNTY], teaches people with lifelong health conditions to do just that. Participants have less pain, more energy and fewer hospitalizations.

The workshop is offered at [LOCATION] and begins [DATE]. It is for adults of all ages who have a chronic disease. Chronic diseases are lifelong health conditions and include diabetes, arthritis, HIV/AIDS, high blood pressure, depression, heart disease, chronic pain, anxiety, multiple sclerosis, fibromyalgia and others.

There’s a significant need for support for people with chronic diseases, which the Centers for Disease Control and Prevention calls the most common, costly and preventable of all U.S. health problems. They are also the leading causes of death and disability, responsible for seven out of ten deaths each year.

“The good news,” says [local instructor, partner or program administrator], “is that people who know how to take care of their health conditions can live successfully with their disease. The *Living Well* workshops are a wonderful complement to medical care, equipping people to live well outside the doctor’s office so they can make the most of their treatment and live the lives they want.”

*Living Well* workshops are delivered in six two-and-a-half-hour weekly sessions. They are taught by two certified leaders; either one or both are non-health professionals who have a chronic disease themselves and will lead the workshop from their own experience.

[Insert a quote from a local leader that explains why they got involved and the benefits they see the workshops offer participants. For example: “It is amazing to see the change that occurs after people go through the workshop,” says [local leader]. “People are more confident, energetic and have a new support system in place, all of which helps them lead a healthier life.”]

During the six-week session, participants receive support from trained leaders and other workshop participants, learn practical ways to manage their pain and fatigue, learn about nutrition and exercise

options, understand new treatment choices and learn better ways to communicate about their conditions with doctors and family members.

[Insert a quote from a participant about the positive benefits they have experienced from taking the workshop].

*Living Well with Chronic Conditions* was created by Stanford University's Patient Education Research Center and is supported by the Wisconsin Institute for Healthy Aging. The state's goal is to put healthy options within reach for all Wisconsinites, and offering these self-management workshops is a way to ensure that people with chronic diseases have the support they need to access those options and live well.

For information on workshops in your area, visit [wihealthyaging.org](http://wihealthyaging.org) or call [phone number].

# # #

# Sample Media Release

Contact Information:

[NAME] [AGENCY]

[ADDRESS]

[CITY, STATE ZIP]

[PHONE]

[E-MAIL]

FOR IMMEDIATE RELEASE: [DATE]

[CITY], WI – [SPONSORING AGENCY] will be offering a Living Well Workshop series beginning [DATE] at [LOCATION].

*Living Well* is a six-week program for people with chronic diseases and their caregivers. Chronic diseases are ongoing health conditions and include diabetes, arthritis, HIV/AIDS, high blood pressure, depression, heart disease, chronic pain, anxiety, multiple sclerosis, fibromyalgia, and others.

During the workshop, participants receive support from trained leaders and other workshop participants, learn practical ways to manage their pain and fatigue, learn about nutrition and exercise options, understand new treatment choices and learn better ways to communicate about their conditions with doctors and family members.

The goal is to help people better manage their health conditions and deal with the frustration, fatigue and pain that can accompany a chronic disease.

[Participants also benefit from meeting other people with ongoing how they cope conditions, learning how they cope and enjoying the camaraderie of knowing that they are not alone in how they're feeling], notes [LOCAL LEADER].

Past participants report increased energy, reduced stress, more self-confidence, and fewer doctors' visits as a result of taking the Living Well workshop.

To register or for more information for the upcoming Living Well workshop, contact [AGENCY CONTACT INFORMATION].

# # #