



Cornell University
College of Human Ecology



CURxED

Cornell University Resource Education for Medicare Part D

Joining us is just the beginning!

The next step involves taking what you know out to the community. Here is a guide to helping you with an Enrollment Clinic so that you can:

- **Be a Resource to the Medicare Beneficiaries You Serve**

You will be informing people with Medicare and their family and friends about the new, cost-saving Medicare prescription drug plans. This is an opportunity for you to serve your members in a unique way and ensure that they get the information they need to live long and healthy lives.

- **Generate Public Awareness**

Community educational events and one-on-one assistance events provide a valuable forum for seniors and people with disabilities to hear from knowledgeable individuals about the new coverage and learn how to join a Medicare drug plan. You will be providing people with Medicare with up-to-date answers to their Medicare questions and assisting them in joining a Medicare drug plan that will help them save money on their prescriptions. By partnering with CMS on this project, you will further establish your organization as a trusted source of information in your area.

- **Expand Your Partnership Network**

Holding an event in your community can help you expand your partnership network and encourage collaboration with other organizations serving people with Medicare and/or their family and friends. CMS can help put your organization in touch with other potential partners in your area.

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Sample Timeline for Event

❖ 1 Month Before Event

- Brainstorm an action plan.
- Choose a planning team.
- Develop a budget.
- Identify and engage partners.
- Determine the location, date, and time for event.
- Identify and invite speakers and moderator.

❖ 3 Weeks Before Event

- Finalize date, location, and time of event.
- Begin outreach and/or advertising for event.
- Compile list of local reporters to invite to event.
- Send invitations to selected partners and VIPs
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❖ 2 Weeks Before Event

- Re-confirm speakers/participant involvement.
- Increase outreach and promotion of event.
- Prepare handouts for the meeting.
- Choose main spokesperson for event.

❖ 5 Days Before Event

- Reach out to local media through a media advisory.
- Finalize all handout material.
- Call partners to gauge attendance.

❖ 2 Days Before Event

- Contact media that have not responded to the media advisory.

❖ Day of Event

- Be prepared to talk to the media.
- Get to the venue early.

❖ After Event

- Record number of people who attended.
- Evaluate your event.
- Follow up with reporters.
- Contact and thank the participants for their involvement.



Helpful Hint...

CMS offers a wealth of helpful tools and resources for partners on its Web site www.medicare.gov. These tools include:

- **The Medicare Prescription Drug Plan Finder** – This interactive tool will help people decide whether they want to join a Medicare drug coverage plan. It will help people with Medicare to compare the Medicare drug plans in specific geographic areas and select a plan that meets their needs.
- **The Medicare Rx Help is Here Resource Kit** – This kit contains general background information about Medicare prescription drug coverage and tools, such as fact sheets, CDs, and a worksheet, that will help staff members who provide personalized assistance understand how to help people with their Medicare prescription drug coverage decisions.

Getting Ready

❖ Brainstorm an Action Plan

Brainstorming an action plan will help you set the goals and create the framework for your event - think about what would be the most effective method for educating the people that you serve about the new coverage. At the very least, the plan should address the following questions:

- What is the goal? Helping people to join a plan? Providing information? Both?
- Who is your audience?
- When and where will the event be held?
- Who—among your staff and partners—will be helping organize the event?
- How much will the event cost? How can you work with your partners to share the cost?
- Who would you like to participate in the event?
- How will you work with your local media to generate coverage?

❖ Appoint an Event Organizer and Planning Team

Build a planning team and appoint an event organizer from your staff who will be in charge of supervising all aspects of the event. In addition to the event organizer, the planning team should include people to secure a location, reach out to additional partners, invite participants and speakers, draft an agenda, and coordinate the event's promotion (e.g., create and disseminate fliers).

The size of your team depends on the scope and size of your event. If you are hosting a smaller educational event about the new coverage at your organization, an event organizer to coordinate speakers and/or materials may be sufficient. On the other hand, if you are hosting a personalized assistance event, you may need a slightly larger team in order to coordinate the additional tasks, such as securing a location with Internet-ready computers and supervising the volunteer counselors.

❖ Recruit Partners

Whether you are planning an educational event or personalized assistance event, having partners is important. Partnering with other groups within your community expands your outreach capacity and your resources. Invite these groups to partner with you for the event, help plan it, and/or send participants to it. Some examples of potential partners include:

- Senior housing facilities and senior centers
- Congregate meal sites
- Public libraries, including bookmobile services and outreach services to the homebound
- Retiree organizations and civic groups (e.g., Lions Club, Rotary Club)
- Chronic disease organizations (e.g., Alzheimer's Association, Arthritis Foundation)
- Senior volunteer organizations (e.g., Retired Seniors Volunteer Program–RSVP)
- Organizations serving communities of color (e.g., Urban League, The National Council of La Raza, Organization of Chinese Americans)

- Organizations serving people with disabilities (e.g., The Arc, Easter Seals)
- Caregiver and respite organizations
- Faith-based organizations (e.g., churches, synagogues, mosques, temples, Catholic Charities, Lutheran Social Services, St. Vincent de Paul societies)
- Hospitals and free or low-cost medical clinics
- City, county, or state elected officials

❖ **Plan Your Event with Your Audience in Mind**

Everything about your forum—including the discussion topics, participants, the venue, the time, and the date—should be developed with people with Medicare and their families and friends in mind. For instance, make certain that the venue is accessible to people with disabilities and/or has parking nearby.

❖ **Pick a Date and Time for the Meeting**

The date that you choose should be at least a month in advance to give you plenty of time to make the arrangements, find speakers, and publicize your event. Make sure your event will not compete with events that may also appeal to people with Medicare and/or their families and friends. You should also keep your audience in mind when selecting a time. Where your community's events geared toward the elderly tend to be held on Wednesdays, do not select these days for your events if competing events are scheduled. To help get media coverage for your event, choose a date that tends to be a slow news day, such as Thursday or Friday.

❖ **Confirm your Material and Equipment Needs**

Make sure your materials and equipment will serve your audience. If you know that a large portion of your audience is visually or hearing impaired, make sure that you have materials in Braille or an interpreter available. Both CMS and SSA have materials in Braille, and a partner organization should be able to connect you with an interpreter. If Spanish speakers make up a large portion of your audience, have Spanish-translated materials on hand. The majority of CMS' and SSA's materials are translated into a variety of languages.

You should also have a good idea of your equipment needs. Check with your speakers or presenters to see what their audiovisual needs are. Confirm with your venue that they are able to provide a microphone, projection screen, or a projector, if needed, or have a laptop and screen available for slide show presentations. If possible, visit the venue before the event. Confirm the audiovisual (A/V) details and check the room where the meeting will be held. Get a demonstration on how the A/V equipment works before the meeting, and/or make sure that the venue will have a technician on-hand to help you if you run into problems. If you are hosting a personalized assistance event, you need a room that contains several tables or desks and chairs in order to do confidential, personalized consultations. You will also need several Internet-ready computers.

Getting Set

This section will guide you through targeting an audience, developing messages for the event, selecting panelists, and choosing materials that will be appropriate for your event.

❖ Determine your Target Audience

People with Medicare should always be your primary audience for a Medicare educational or personalized assistance event. You may decide, however, to tailor your event to a particular subgroup of this target group based on your constituents or members, as well as other events in your area. For example, you may partner with a local caregiver association to host an educational event to explain the new coverage to the family and friends of people with Medicare and to encourage them to help people who decide to join one of the new drug plans.

❖ Develop a Format

Choose the most appropriate format—an educational presentation or personalized assistance event—to achieve your goals and accommodate the people you want to attract. You should select a format that complements your organizational structure, as well as the needs of your people with Medicare. You know what works best for your organization and what will resonate with the people you serve.

You may decide that an educational presentation may work best with your existing program structure or as a great precursor to an assistance event. Many senior centers, for example, host regular educational presentations as part of their outreach activities. Senior centers could draw speakers from the community, SSA, and SHIP to discuss how the new prescription drug coverage helps save money for people with Medicare. See *more about the SHIP program in section 1.D.*

A Medicare drug coverage personalized assistance event will likely be the best option for most organizations. (For more information on how to conduct personal assistance, see pages 10 - 12). This approach gives people with Medicare the opportunity to speak with knowledgeable staff who can assist them with their questions and walk them through the enrollment process.

❖ Draft an Agenda

The “flow” of your agenda depends on the format of your event. If you are hosting a personalized assistance event, you should include an educational presentation component to your agenda. Make sure to include time for introductions and questions, as you will need to answer specific questions for each attendee as the specific questions may not be covered in your presentation.

❖ **Select Speakers or Discussion Leaders**

Good speakers are essential to a good event. Choose speakers or discussion leaders who are engaging and knowledgeable. Possible speakers could be SHIP advisors, representatives from your local Social Security office, or community leaders and/or educators from key partner organizations, such as the Organization of Chinese Americans or Catholic Charities.

When selecting speakers, consider choosing nonpartisan, credible speakers who will bring media attention to your event. On the other hand, you could also raise your event's media status by selecting a highprofile moderator. Choose a moderator (e.g., a local news anchor, media personality, health advocate) who is respected in the community and who can also generate interest among the community and the media.

❖ **Train Your Staff**

Everyone from your staff who is participating in the event should know at least the basics of the prescription drug coverage, and ideally, those who are assisting people in joining drug plans should have participated in CMS training about the new coverage. The fact sheets and handouts included in this guide, as well as the on-line partner resources, provide a wonderful primer.

The “Medicare Rx Help is Here Resource Kit” contains general background information about Medicare prescription drug coverage and tools, such as fact sheets, CDs, and a worksheet, that will help staff members who provide personalized assistance understand how to help people with Medicare at all stages of the decision-making process.

That said, you are **not** expected to know all the answers. Remember, you can always refer participants to 1-800 MEDICARE (1-800-633-4227; TTY users call 1-877-486-2048), and www.medicare.gov for additional information and clarification.

❖ **Promote Your Event in the Community**

In order to get the maximum number of people at your event, you will need to raise awareness about your event in the community. Utilizing the media is a great low-cost way to let your community know about your outreach, education, and assistance capabilities. The earlier you can start promoting the event, the better. Distribute fliers where people with Medicare typically gather (e.g., senior centers, public libraries, senior housing facilities, congregate meal sites, community service groups) at least two weeks before your event. Make sure that the fliers include all of the necessary information about the event—time, location, date, a point of contact, and the people who will be involved. Let the coordinators at these locations know about your event and ask them to publicize it, as well.

GO!

❖ Arrive Early to the Event

On the day of the event, arrive at your venue at least an hour early (2-3 hours early if you will be hosting a large group) to leave time for setting up the room and addressing any last-minute logistical issues. You should have a clearly visible sign outside of the meeting location that directs your audience to the exact event location, and if your room is not immediately visible once people enter the venue, additional signs should clearly direct them to the meeting room.

❖ Set Up the Room

Set up your venue according to the format of your program. For example, for an educational presentation, you may want to use a “U”-shape format. The lecturer and/or speakers are centered in the middle of the room and the audience’s chairs and/or tables are situated on the sides and in front of the presenters, forming a “U” shape.

For a personalized assistance event, you should have several enrollment stations (tables and chairs) set up around the room. You want to make sure that the stations are spaced far enough apart to give participants some privacy during their sessions.

For either event, place a sign-in table either outside of the room or in a central location once you enter the room. Assign someone to staff the table in order to welcome guests and ask them to fill out a sign-in sheet. Also, if your budget allows, invest in nametags that your participants can complete or that you can complete for them. Nametags are a relatively inexpensive way to foster a feeling of community for your event.

In addition, get to know your meeting space, including where the restrooms, water fountains, and telephones are located, and where people can park.

❖ Double-Check Your Materials and Supplies

Make sure that you have counted out enough agendas, fact sheets, handouts, and other presentation materials to distribute to at least 10%-25% more participants than you expect to attend. You always want to make sure that you have enough materials on hand. You can place material packets at each seat prior to the event, distribute the materials as people come into the event, or disseminate them during the event. You could also place materials on the sign-in table and encourage participants to pick up their packets when they arrive.

Remember to bring office supplies to the meeting (pens, scissors, tape, markers, clipboards, notepads, etc.). This will give people with Medicare supplies that they can use to take notes during the presentation and during the personalized assistance event.

❖ **Do a Practice Run with Your A/V Equipment**

Test your A/V equipment before the event begins. Conduct a mini practice run to ensure that all the equipment works and that you know how to operate it. Address any problems or questions with the hosting facility's A/V technicians before the event begins. Before a personalized assistance event, check all your computers to make sure that they are working and can connect to the Internet.

❖ **Clearly Designate Staff Responsibilities**

To help the event run smoothly on the day-of, your staff should be given certain roles. The size of your team depends on the scope and size of your event. If you are hosting a larger, educational event, for example, you should assign your staff members such roles as troubleshooter, program/speaker coordinator, media coordinator, and timekeeper.

For example, the event organizer would probably be in the best position to act as the event troubleshooter who addresses any problems or concerns that arise during the event. The person who was responsible for promoting the event should be in charge of the media on the day of the event. That person should greet reporters as they arrive, coordinate interviews, and distribute media packets. The program/speaker coordinator would be responsible for addressing any needs of the speakers and moderator, as well as any programmatic problems. If the program is running long, for example, the program/speaker coordinator would work with the timekeeper to determine how best to get the event back on track (e.g., make one presentation shorter, etc.).

If you are hosting a personalized assistance event, on the other hand, you may need a slightly larger team. In addition to many of the people noted above, you may also need someone to supervise the volunteer counselors and coordinate the scheduling for the sessions (i.e., direct people to available counselors and/or make sure people have completed the necessary forms).

❖ **Evaluate Your Presentation**

Distribute evaluation forms at the end of your presentation or assistance event, and encourage all participants to complete the forms and return them to you. A sample event evaluation form is included in the Materials Section of this guide. When your event is over, tally up the returned forms and analyze the findings. You can use the feedback from these forms to inform the planning and implementation of your next event.

❖ **Follow Up**

Conduct a debriefing session with your staff and volunteers after the event. Discuss what worked well and any issues, concerns, or comments the staff received from participants. If you have completed your analysis of the evaluation forms, talk about those findings, as well. Feedback is important for continuous improvement so be sure to include an open dialogue about the evaluations.