

Our  
Healthcare  
Future.org

# the dialogue

## Guide for Dialogue Hosts

*for both half-day and full-day dialogues*

*...a priority driven dialogue*

[designteam@ourhealthcarefuture.org](mailto:designteam@ourhealthcarefuture.org)

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



# the dialogue

## Check list for hosts

Hosts are responsible for planning and implementing a dialogue. Planning should begin eight to twelve weeks before the date of the dialogue. Implementation includes the following tasks:

- Secure hosts/sponsors . . . . .1  
    Secure hosts (existing groups)  
    Secure diverse hosts/sponsors (created groups)
- Find two experienced facilitators from your community to lead the dialogue . . . . .3
- Locate meeting space . . . . .5
- Adjust the sample budget . . . . .7
- Set the date . . . . .8
- Invite a mix of people from your community to participate . . . . .8
- Gather materials, supplies and equipment . . . . .11
- Recruit two people to assist with tasks on the day of the dialogue . . . . .12
- Make arrangements for registration, child care, hospitality and lunch . . . . .12
- Plan two or three “next steps” people can take after the dialogue . . . . .15
- Get media coverage of your dialogue . . . . .17
- Set up the room on the day of the dialogue. . . . .17
- Enjoy the day!



## Hosts

Hosts are the small group of people who will take the lead in planning and implementing the dialogue. Maintaining a group size of two or three will help ensure a nimble, efficient working group. The main tasks for hosts are listed below.

### **Make a Decision about Participants: An Existing or Created Community?**

While the dialogue was originally designed to engage people who may not ordinarily get the chance to talk with one another, it has also been used with already formed groups, such as employees of a hospital or leaders from non-profit agencies.

There are pros and cons to each of these participant pools.

- Existing groups often have a developed capacity to engage in follow-up conversations and action. However, these groups may not always be as diverse or representative of the larger community.
- Created groups, formed by hosts intentionally inviting a broader cross-section of the community, often yield a more diverse and rich dialogue. However, such groups may find it difficult to follow the dialogue with further conversation or action.

There is no “right” or “wrong” way to gather people. Being aware of the strengths and limitations of this decision simply helps hosts to plan accordingly.

### **Secure Hosts (Existing Groups)**

If you will host a dialogue for an existing group, build a group of two or three people who can lend their names to promotional materials and who will be effective at inviting participants and creating “buzz” about the dialogue.

### **Secure Diverse Hosts/Sponsors (Created Groups)**

If you will host a dialogue intended to create new relationships across your community—that is, to bring together people who have not had genuine opportunities to talk and work with one another in the past—then the process begins with the intentional gathering of diverse sponsors.

Sponsors are a group of organizations that will contribute to your local dialogue by lending their names to promotional materials, designating a person to work on the host team (optional), contributing money, goods or services to the project, and helping invite and gather a diverse group of participants.

#### **To identify sponsors, you can:**

- Gather a group of people from your organization
- Present the two paragraphs above on “Secure Diverse Sponsors”
- On a whiteboard, chalkboard, or chart paper, recreate the “Sponsorship Brainstorm” graphic following.



- Engage in brainstorming, filling the graphic with your ideas. Remember, in brainstorming, ideas are quickly generated and written. All answers are accepted without evaluation from other group members.
- As the brainstorm winds down, you may wish to consult the following list to make sure you have listed groups from each of these sectors: health care, human services, small business, faith communities, community-based organizations, corporate business and educational institutions; local, state and federal agencies; elected local, state and federal officials and their offices. In addition, building from your knowledge of your community, consider groups that represent diversity within the community. Diversities to consider include: age, race/ethnicity, income, degree of formal education, occupation, number of generations in the U.S., insured/uninsured.
- When you are satisfied with the brainstorming, consider these questions as a group:
  - Looking at the list, what two or three groups would be a stretch for us, meaning that working with them would be both new and slightly outside our usual comfort zone AND at the same time possible?
  - With what one or two groups do we have existing relationships that we could strengthen with this project?
  - Which of these groups will help bring the diversity we need?

As you engage in the conversation, listen for emerging agreement on a list of groups to invite as sponsors.

- Make and record your agreements on who will extend the invitations to sponsors, by when, and a deadline for replies.
- As you talk with potential sponsors, invite them to visit [OurHealthcareFuture.org](http://OurHealthcareFuture.org) to learn about this effort and the importance of dialogue. The video “*Why Dialogue?*” in the dialogue library and the FAQ pages may be especially helpful.

Hosts / Sponsors			
Invitation extended to this group...	...by this person...	...by this date...	...with a response back from the group by this date...
<p>The next meeting of this group of hosts is scheduled for:</p> <p>Date:</p> <p>Time:</p> <p>Place:</p>			

### Find Two Experienced Facilitators

Dialogue facilitators need certain capacities. Primary among these is the ability to create an atmosphere of safety and respect that will invite the full participation of each person. Effective facilitators will have experience setting clear directions for groups of diverse people, managing a daylong sequence of exercises that require both flexibility and completion, and maintaining a calm, attentive presence.

The effective facilitation team will be comprised of two to three such diverse people who can commit fully and joyfully to the responsibilities and dialogue process outlined in the *Guide for Dialogue Facilitators*.

A few words of caution about selecting facilitators: This dialogue process requires the leadership of facilitators experienced in helping groups engage in conversations marked by full participation and the honoring of each person’s experience. Not everyone with expertise in health care, formal teaching, corporate training or other more institutional forms of education will have the skills and experience required to lead a dialogue. Be diligent in finding and choosing facilitators who have demonstrated experience in this type of structured, community conversation. Further, this dialogue process has been designed with intention and has been pilot-tested. We know it works. **It is vital to secure facilitators who are open to facilitating the design presented in Guide for Dialogue Facilitator's manual.**

Two documents, “*The Guide for Dialogue Facilitators*” and “*Tips for Dialogue Facilitators*” are posted in the dialogue library at [OurHealthcareFuture.org](http://OurHealthcareFuture.org). These will be useful in helping potential facilitators learn more about the dialogue and the facilitation style needed.

facilitators			
Possible dialogue facilitator’s name...	...Demonstrated experience includes...	...as verified by the following people...	...Who will invite and by when...
Confirmed facilitation team			
Name		Phone	E-mail

## Locate Meeting Space

The ideal space for the dialogue will meet as many of the following criteria as possible.

### – Geography

- Centrally located so as to equalize travel time of participants
- Easily accessible by car and, where applicable, mass transit
- Nearby green space where participants can walk during lunch

### – Building

- Accessible to all participants, including those who use wheelchairs
- Ample parking for those who will drive
- Restrooms that can easily accommodate the group
- Suitable meeting room space as well as a nearby room for child care

### – Meeting Room

- Space large enough to accommodate the following
  - Five to nine tables with six chairs at each and ample space for people to navigate the room when people are seated (*Note: not so large that the space would still feel cavernous with these tables set up*)
  - Ample wall space for putting up posters to create a “gallery walk” where participants would be able to walk along and read the posters
  - Room to set up a registration table and a hospitality table (*note: if you decide to serve lunch, ensure the facility has enough tables and space to also set this up*)
- Needed tables and chairs available
- Permissible to hang things on walls (*e.g. posters with masking tape*)
- Permissible to have food and beverages in the room
- Clock visible from throughout room (*for setting times for group*)
- Assistance with set-up and tear-down available
- Hospitable and adjustable lighting and ventilation (*i.e. heat or air conditioning*)
- Free of excessive or distracting noise (*e.g., check to see what other groups might be meeting and what affect this may have on noise levels*)
- Outlets for computer and printer
- Laptop printer for compiling survey notes
- A second laptop and LCD projector for showing recorded segments
- Sound system with multiple (*at least three*) microphones that can be set up around the room
- Access to a copy machine

**– Environment**

- Perceived as a safe and inviting place by a broad spectrum of potential participants.

**– Availability**

- Space available on a range of dates
- Space available for the full day, including time for set-up and clean-up
- Site manager willing to hold several dates for a brief period while decision is made.

meeting space		
Potential Meeting Space: Building & Address	Contact Person	Who will complete exploratory site visit & by when...

## Create and Adjust the Sample Budget

Budgets will vary. The budget below assumes no donated goods or services. Costs will be reduced significantly by inviting organizations, businesses and interested individuals to contribute in-kind goods and services. During the pilots of the dialogues, most meetings cost under \$1,000 as organizations donated space, staff, printing and other essentials.

Sample Dialogue Budget		
Item	Estimated Cost	Assumption
Child Care	\$350	1 child care professional per two children; 4 children present 2 child care professionals for 7 hours @ \$25 per hour (Note: In the eleven pilots, groups did not offer child care. Parents used their usual providers.)
Facilitator Fees	\$1,400	2 facilitators @ \$700 (includes two days preparation; set up and facilitation of dialogue; facilitation; half-day follow-up)
Stipends	\$500	Stipends for 10 participants @ \$50 each (Note: Some locations may wish to offer stipends to low-income individuals for whom attendance at a full-day meeting presents an economic burden)
Hospitality	\$500	Morning: coffee, juice, fruit and pastry for 50 people (includes facilitators) at \$5 per person Afternoon: soda, coffee and snacks @ \$5 per person (Note: 50 includes four children and 2 child care workers)
Lunch	\$500	Box lunches or catered lunch; 50 people @ \$10 per person
Room Rental	\$500	
Mailings (invitation and follow-up)	\$75 \$35	Four mailings: invitation, reminder note and two follow-up mailings; 42 people; Postage: 44 cents per mailing (4 x 42 x 44 cents) Printing: 4 pages; double sided; 10 cents per copy (4 x 2 x 42 x 10 cents)
Manuals, Facilitator	\$20.00 \$10.00	Printing: 66 pages printed back to back (33 double-sided pages) on white drilled (three hole punched) paper; with color cover; 2 facilitators Binders: white, view, 1 inch D-ring binders @ \$5.00 each
Manuals, Participant	\$220 \$90	Printing: 60 pages (30 double sided pages) on white (three hole punched) paper; with color cover, estimate \$5.50 per manual for 40 participants Binders: white, view, 1/2 inch round ring binders @ \$2.25 (\$90)
Posters	\$160	Poster-sized enlargements (approximately 24" x 32") of the Current System & Future System posters for each table group @ \$10 each (8 tables x 2 posters x \$10)
Name tags	\$25 \$10	Labels for nametags: 1 box of labels (3 1/3 inches by 4 inches; 6 per page) Color Printing: \$1 per page; 10 pages
Other Materials	\$5 \$20 \$40	Masking tape: 2 rolls of 1" masking tape (\$2.50 each); Highlighter for each person (\$5 per doz. x 4); Colored paper or plastic table cloths \$3 each); Sharpie fine-point markers (1 four-color set per table; 8 tables @ \$5 per set)
Miscellaneous Expenses	\$50	
Estimated Total	\$4530	

## Set the Date

Keeping in mind the availability of the facilitators and potential participants as well as the meeting site, select a date. Given that many people will not be able to take time off from work to attend, consider a weekend date. In some instances, the collection of sponsoring agencies may be able to provide a diverse cross-section of participants and may agree to offer the dialogue as an in-service for employees. In such a case, a workday can be chosen.

Select a date eight to ten weeks out to ensure adequate time for issuing invitations, securing RSVPs and making other necessary preparations.

Set the Date	
Decision on Date and Location	
Date	
Time	
Location	

## Invite a Mix of People from Your Community to Participate

Whether you are working with an existing group or creating a group, consider ways that you can bring together people who may not ordinarily have the opportunity to talk at length with one another.

Before extending invitations, locate or create a profile of your community and its diversity. Diversities to consider include: race/ethnicity, income, degree of formal education, occupation, number of generations in the U.S., insured/uninsured.

After reviewing your community's profile, develop strategies that will help tap into this diversity as you extend invitations to people.

Because of people's busy lives, they sometimes have to cancel at the last minute. Hence, invite more than the total number desired. Again, we suggest that a good group size is 25 to 40 participants.

For your convenience, a sample invitation/registration database file, letter (*which can be merged with the data file*) and flyer are included in the dialogue library at [OurHealthcareFuture.org](http://OurHealthcareFuture.org).

## Sample Letter of Invitation

	Date
Name of Your Organization	Dear [Name of Invited]:
Sponsor #1	<p><b>Most of us know that health care in the United States is in trouble.</b></p> <p>We need to roll up our sleeves and reshape health care for the 21st Century. Most of us no longer rely on individual wells for water, our own generator for electricity, nor build our own road from home to work. Instead, we have created systems that reliably provide us with electricity, water, and roads to get around. And yet, when it comes to health care, many of us are just a job loss, birthday, or illness away from being left on our own when it comes to health care.</p>
Sponsor #2	<p><b>We think it's time to get involved.</b></p> <p>Building an effective healthcare system starts with getting people together to look at where we are today and where we, as a country, want to be in the future. What kind of health care system do we want to leave as a legacy to the children in our lives, to the children in our community?</p>
Sponsor #3	<p><b>You are an important part of the answer.</b></p> <p>We think it's time for the conversation to include your voice and your wisdom. On [date] a group of 30 to 40 people from [name of community] will gather to sort out our priorities for health care. We'll then look at how these priorities play out in the current system and in some possible futures for health care. The day is put together in a way that invites you to share your thinking and to listen to the ideas of others. Together, we'll build toward a better future.</p>
Sponsor #4	<p><b>Please say "yes"!</b></p> <p>Here's the basic information you need:</p> <p style="padding-left: 40px;">Our Healthcare Future: A Community Dialogue [Date] [Name of building, meeting room, address] [Beginning and End Time, suggest 8:30 a.m. registration, meeting 9:00 a.m. - 4:00 p.m.] [Hospitality, lunch and child care provided.]</p> <p>Please RSVP by contacting [name] at [phone number] or [e-mail]. We promise you a day filled with productive conversation, important learning, and useful steps toward a better healthcare future for us all.</p> <p>I look forward to seeing you on the [date].</p> <p>Sincerely,</p> <p>[signature]</p> <p><i>P.S. Learn more about the dialogue at <a href="http://www.OurHealthcareFuture.org">www.OurHealthcareFuture.org</a>. Check out the "Frequently Asked Questions for Participants"</i></p>

## Sample Flyer

Name of  
Your Organization

- Together, let's begin reshaping health care for the 21st Century!
- For the children in your life and our community, let's leave the legacy of a health system that works for their entire lives!

Sponsor #1

## Our Healthcare Future: A Community Dialogue

[Date]

[Name of building, meeting room, address]

Sponsor #2

[Beginning and End Time]

[Hospitality, lunch and child care provided.]

Sponsor #3

*RSVP by contacting [name] at [phone number] or [e-mail]*

We promise you a day filled with productive conversation, important learning, and useful steps toward a better healthcare future for us all!

Sponsor #4

### How do I get there?

By Mass Transit: [Provide directions for bus or train, including how to get from transit stop to building and meeting room]

By Car: [Provide driving and parking directions, including how to get from parking lot to meeting room]

### What do I need to bring?

You need to bring your experience and best thinking. Be prepared to share it with others. Be open to hearing others out.

We'll take care of everything else, including [hospitality, lunch, child care], healthcare materials, skilled dialogue facilitators, and the other things we need to make this a productive day.



the dialogue

For general information on the dialogue or to sign up for our online newsletter discussing health care, visit [www.OurHealthcareFuture.org](http://www.OurHealthcareFuture.org)

## Gather Materials, Supplies and Equipment

### – Materials

*Coordinate the following with the facilitators*

Download the following from the dialogue library at [www.OurHealthcareFuture.org](http://www.OurHealthcareFuture.org)

- Guide for Dialogue Facilitators
- Guide for Dialogue Participants

Order from the dialogue library at [www.OurHealthcareFuture.org](http://www.OurHealthcareFuture.org):

- “Healthcare Dialogue Recorded Segments,” order a copy in video or CD format  
*(coordinate ordering with the facilitators)*

### Supplies

- Masking tape for hanging posters and charts *(Note: Some sites may use bulletin board strips and push pins) zxcv*
- Pens and/or pencils for participants
- Highlighters, one per participant plus a few extras
- Set of four Sharpie fine-point markers for each table group
- One container *(a bowl, basket, hat)* for slips of paper *(used when table groups select a future)*
- *Table cloths or a colored construction paper tent for the center of the each table (a different color for each table)*

### Equipment

- Laptop computer with CD drive on which survey software has been loaded *(used to tabulate and publish the priorities survey)*
- Printer (compatible with the laptop used to compile the survey) for printing out the survey results
- A second laptop computer with external speakers to assure adequate audio level, an LCD projector, and a screen for showing the recorded segments
- Photocopier for making copies of the two printouts—“Applying this Group’s Value Priorities to the Current System” and “Applying this Group’s Value Priorities to a Future System.” *(Note: If you prefer, you can print the copies out on the printer)*
- Clock large enough to be seen throughout the space *(if site does not have one)*
- Camera(s) for recording/reporting on the event to your community and the sponsors
- Chime *(e.g. the Zenenergy Trio Woodstock chime, available online)* or bell for getting the group’s attention

## Recruit two people to assist with tasks on the day of the dialogue

You have one or two volunteers—they can be hosts—who can help the facilitators collate the health care values priority surveys (Conversation Three in the facilitator manual).

These same people may be asked to work the registration, oversee morning and afternoon hospitality, and set up lunch. (See these tasks under “Make Arrangements for Lunch, Registration, Hospitality and Child Care.”)

## Make arrangements for registration, child care, hospitality and lunch

Intentional hospitality will help set participants at ease, provide them energy and create the atmosphere vital to the success of the dialogue process. At the same time, there is no single way to do hospitality well. Below is a list of things to consider.

- Greeters
  - Invite friendly people from sponsoring agencies to serve as greeters as people arrive. Station greeters at the doors of the building and others in the meeting and child care rooms. Brief them in advance so that they can offer directions to the meeting room, child care room and restrooms.

Greeters		
Name & Organization	Phone	E-mail

- Registration table
  - Staff a registration table where people can sign in, pick up pre-printed nametags and get any arrival-related questions answered

Volunteers for Registration Table, Survey and Lunch Set-Up		
Name & Organization	Phone	E-mail

- Child care

- Offering child care may assure that young parents can participate.
- Secure trained child care providers and make sure the ratio of children to child care people is adequate.
- If using a space that is not typically used for child care, work with providers and parents to ensure children will have the necessary toys, books, napping implements (cribs, sleeping mats, etc.) that will be needed.
- As you plan lunch and morning/afternoon hospitality, consider food for children and child care workers.
- Invite a sponsor to cover any costs associated with child care.

Child Care Providers		
Name & Organization	Phone	E-mail

- Morning Hospitality

- Plan to set up an easily accessible table with generous offerings.
- Beverages: coffee, tea, juice, water and other things you know your group will be looking for as they arrive.
- Healthful snacks: Granola bars, fresh fruit, and/or mini-muffins.

Morning Hospitality		
Name	Phone	E-mail

## Lunch

- Order box lunches or other meals that are easy to distribute.
- When people RSVP, invite them to make a lunch selection; to make it easy, offer only two or three choices.
- Include a vegetarian option for lunch.
- Contract with a local business to provide lunch. Tell them about the project and ask if they will donate or discount the lunch in exchange for a plug for their business.
- Designate someone to be responsible for the lunch: making sure it is delivered on time, paid for, set up and organized for easy distribution, and that trash cans and other items needed to clean up are available, etc.

Lunch		
Name	Phone	E-mail

## Afternoon Hospitality

- Designate someone to set up the afternoon snacks.
- Beverages: juices, water, soda and other things you know your group will be looking for as they take an afternoon break.
- Healthful snacks: Pretzels, fresh fruit, trail mix, etc.

Afternoon Hospitality		
Name	Phone	E-mail

## Plan Two or Three Next Steps People Can Take after the Dialogue

A key part of the process will be sharing with participants a list of things they can do after the dialogues. These may include, and are not limited to: additional voluntary dialogue meetings among group members; follow-up reporting with policy makers and the press to share insights from the group's dialogue and deliberations; identifying and encouraging participants to join forces with existing healthcare reform efforts.

To this end, each group of hosts will develop its own one-page follow-up list to be used during the dialogue meeting. Depending on available resources and interest, members of the convening group may wish to take responsibility for calling together interested participants after the dialogue and working with them to further plan and implement specific strategies.

These next steps need to be sent to the facilitators two to four weeks before the dialogue so that they can prepare the next steps sheets and poster for participants.

## Sample follow-up sheet

You can continue to help create a better healthcare future

### ✓ Join with people from this dialogue group to...

- Plan and implement an evening follow-up dialogue for interested members of this group. (See [OurHealthcareFuture.org](http://OurHealthcareFuture.org) for suggested resources.)
- Conduct a planned visit with elected state officials [specific names of representatives or committees added here] to report on today's exploration of the future of health care.
- Conduct a planned small-group visit with elected federal officials [specific names of members of Congress added here] to report on this group's exploration of the future of health care.
- Write and submit a letter to the editor or op-ed piece on the future of health care to the [name of local paper(s)].
- Sponsor and implement this dialogue with another group of people from our community.

### ✓ Join other concerned people to work for a better healthcare future...

#### Local Action

- [Include name of organization, street address, telephone, website, e-mail and brief annotation of what active role participants can take in the group to continue to build on the work they did during the dialogue.]

#### Statewide Action

- [Include name of organization, street address, telephone, website, e-mail and brief annotation of what active role participants can take in the group to continue to build on the work they did during the dialogue.]

#### Nationwide Action

- [Include name of organization, street address, telephone, website, e-mail and brief annotation of what active role participants can take in the group to continue to build on the work they did during the dialogue.]

## Get Media Coverage of Your Dialogue

Use local media contacts—TV news, radio, newspaper—to get coverage of the dialogue and the issue of health care. Make sure that one of the hosts is there to greet and work with media. It is important to keep a balance between getting coverage of the event and allowing the dialogue process to unfold without significant disruption.

## Set Up the Room on the Day of the Dialogue

The smooth running of a dialogue depends on a well set-up space, with everything in place well before the first participant arrives. We suggest arriving two hours to 90 minutes before the dialogue to set everything up.

Coordinate the following tasks with the Facilitators

Registration table:

- Nametags and markers (*for any changes in nametags*)
- Registration list
- People to work registration (*Note: As people register, they are asked to sit with people they do not know; this is a key factor for the dialogue.*)

Table groups:

- Each table set for six people
- Materials at each table:
  - Binder with “Guide for Dialogue Participants” at each place
  - Highlighters, one per person at each table
  - A few pens at each table (*for people who didn't bring one*)

Supply table for things needed later in the dialogue:

- Masking tape or other fasteners for putting up posters
- Posters: “Current System” and “Future System”
- Sharpies fine-point, set of 4 for each table group
- Basket or bowl for “Future One” and “Future Two” slips
- Envelopes with “Future One” and “Future Two” slips
- Camera
- Chime or bell

#### Technical equipment:

- Laptop computer and printer for compiling and printing survey results
- Access to copier if you will be photocopying survey results rather than printing them
- Equipment set up for showing the recorded segments from video or CD (*VCR and TV for video or Laptop with CD drive/LCD/screen for CD*) If you will be using a Laptop with CD drive to show the recorded segments, you will need two Laptops with CD drive for the day: one for showing recorded segments and a second for compiling the survey results.
- Clock in the room—large enough and in a location where people can see it
- CD player with music to play during registration and lunch.

#### Hospitality:

- Greeters to welcome people as they come and direct them to registration
- Morning hospitality set up
- Clarity regarding time, location and logistics for serving lunch and for afternoon hospitality.

#### Child care (*if you will be offering this*):

- Clarity regarding details related to child care.

*Enjoy the day!*