



Chapter 2: Conducting Network Expansion Activities

Introduction

This chapter introduces the network expansion tools and activities developed as part of the CMS State Health Insurance Assistance Program Technical Assistance Program (SHIP TAP). These activities are designed to help SHIP organizations expand their networks to meet the specific needs of people in their states. For example, a SHIP Director in one state may want to use the tools in this section to identify mental health partners who could receive Medicare training, while another Director may focus on building a communications network for exchanging information on issues that affect Medicare beneficiaries with mental illness.

The tools in this chapter are focused on building multidisciplinary networks. This type of network is sometimes referred to as a “community of practice” or a “community of action.” Important elements of a multidisciplinary network include:

- ❖ **The individuals who make up the network bring different expertise** to the table. In this case, the network will include professionals with an expertise in Medicare benefits and other professionals with an expertise in mental health.
- ❖ **Networks are formed to address shared needs.** The motivation to come together springs out of what can be accomplished by the synergy of the group as opposed to what the individual organizations can accomplish alone. The catalyst for forming this type of network is the shared benefit to all individuals and their organizations. There is no mandate or funding associated with forming a network, so participation is voluntary.

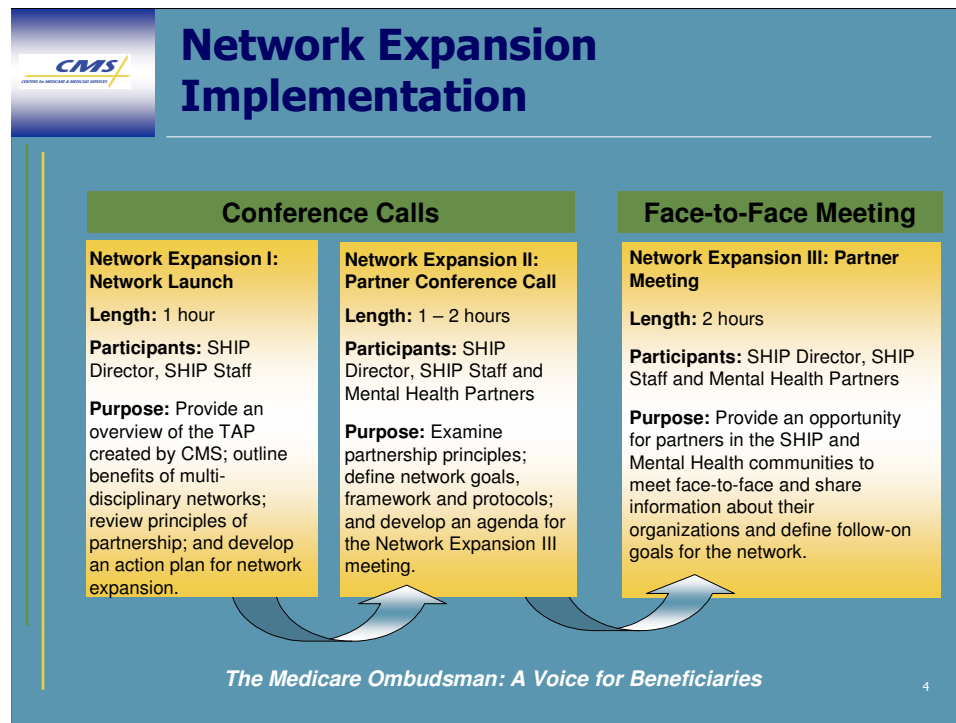
Many SHIP programs have already expanded their networks through successful outreach related to the Medicare prescription drug benefit. To support the mentally ill, however, SHIPs also need to work closely with community-based mental health providers, health care providers such as emergency personnel or pharmacists, and other caregivers. One goal of TAP is to help SHIPs expand their networks to include these providers.

Rich and active networks make everyone’s work more efficient. Network participants can, for example, provide advice to a SHIP counselor. In addition, SHIP counselors can assist other members of the network by helping people with a mental illness to understand Medicare benefits and select Medicare Advantage or prescription drug plans. Thus, the second two TAP network expansion goals are to increase awareness of SHIPs among people with mental illness who have Medicare benefits and to exchange information on the Medicare program and mental health.

How Does SHIP TAP Support Network Expansion?

Through SHIP TAP, CMS has designed a program to inform and catalyze the expansion of multidisciplinary networks. Two conference calls set the foundation for a face-to-face meeting of the SHIP Director, SHIP staff, and mental health partners. These are shown in Figure 2-1.

Figure 2-1. Network Expansion Program



- ❖ **Network Expansion I – Network Launch:** SHIP organizations use this conference call to explain the principles of effective partnerships, identify SHIP goals for network expansion, select potential mental health partner organizations, and create a plan for inviting mental health partners to participate in the network. Articulating and agreeing to a vision and a set of goals is, in itself, an important step in maximizing the effectiveness with which a SHIP organization serves people with mental illness. In addition, this conference call is used to set up the details of the following meeting.



- ❖ **Network Expansion II – Partner Conference Call:** The attendance list for this conference call is expanded to include mental health partners. The attendees identify the origins of SHIP TAP for network expansion; explain the benefits of multidisciplinary networks and the principles of partnership; validate the goals established during Network Expansion I and define the goals, framework, and protocols of the network; and undertake next steps in the network expansion process.

Exploring these topics at this meeting allows you to:

- Involve all participants in setting the agenda and preparing for the face-to-face meeting.
- Focus on active development of the network during the face-to-face meeting.

- ❖ **Network Expansion III – Partner Meeting:** This face-to-face meeting is an opportunity for the different organizations to meet together and build personal relationships while accomplishing goals that benefit people with Medicare who have a mental illness.

The objectives and agenda of the session are set during the Network Expansion II partner conference call. The attendees could choose to use this meeting, for example, to develop an outreach campaign. Alternatively, they could choose to meet with Medicare-eligible individuals to explain benefits in a specific geographic area. Whatever the agenda, working together for two hours in the same room allows attendees to “put faces with voices.” The network will be strengthened by this personal contact and the focused discussion of common goals.

In Appendix A, you will find PowerPoint slides to support and direct the conversation for each of the three network expansion meetings. For ease of use, these slides are being distributed in a single presentation file. The slides provide guidance on the purpose, goals and objectives of each meeting, content to convey, and suggestions on how to approach the activities as a set, building toward the face-to-face meeting. The meeting facilitator will need to adapt the slides based on local needs and the information generated during network expansion activities. For example, the goals of the SHIP related to network expansion established during Network Expansion I, should be inserted into the Network Expansion II slide set. Complete directions for using the tool can be found in the notes section of the presentation.

*There is a great deal of information in the notes portions of the slides. Be sure to display the presentation with notes displayed (on the **View** menu, select either **Normal** or **Notes Page** to see the notes). You may also want to print the presentation with notes displayed in preparation for a meeting (on the **File** menu, select **Print**; then select **Notes Pages** from the **Print what** drop-down list).*



You have two choices for displaying slides during the meetings:

1. Open the presentation to the correct opening slide for the day (Network Expansion I, II, or III slides).
2. Copy the entire presentation and then delete the slides you will not need from the copy. At times, when you copy slides from PowerPoint and then paste them into a new PowerPoint file, you will notice changes in the slide layout. This occurs because a different slide template is being applied to the slides. Copying the entire file and deleting the slides you do not need is often a faster approach.

Conducting SHIP TAP Network Expansion Activities

There are three meetings included in the SHIP TAP: two conference calls and one face-to-face meeting. Table 2-1 identifies the timeline for the activities and key tasks required. While many SHIP personnel are adept at implementing programs like the network expansion activities, these guidelines are provided for anyone who would like to use them.

Table 2-1. Timeline for Network Expansion Activities

Responsibility	Timing	Tasks
Network Expansion I – Network Launch: Conference call with SHIP staff		
SHIP leadership	4-6 weeks before the call	<ul style="list-style-type: none">• Assign a SHIP staff member to be the logistics coordinator for, preferably, all three SHIP TAP network expansion activities.• Plan time for outreach activities.• Initiate discussions with people you know; then conduct Internet research, as necessary, to fill in the gaps.
Logistics coordinator	2-4 weeks before the call	<ul style="list-style-type: none">• Organize contact information.• Schedule the meeting.• Distribute meeting announcement and agenda.
Logistics coordinator	During and immediately after the call	<ul style="list-style-type: none">• Take and then distribute meeting notes to attendees.• Document the potential partners identified during the call.• Gather and distribute feedback to SHIP leadership and to attendees.• Solidify logistics details for the next meeting.
SHIP leadership	During and immediately after the call	<ul style="list-style-type: none">• Convey the importance of network expansion to the SHIP organization.• Respond, as necessary, to feedback from the meeting.• Contact potential partners identified during the meeting to get them “on board” and to identify availability for participating in the remaining two meetings.



Table 2-1. Timeline for Network Expansion Activities (cont.)

Responsibility	Timing	Tasks
Network Expansion II – Partner Conference Call: Conference call with mental health partners		
Logistics coordinator	2-3 weeks before the call	<ul style="list-style-type: none"> Schedule the meeting. Distribute meeting announcement and agenda.
Logistics coordinator	1 week before the call	<ul style="list-style-type: none"> Distribute a meeting reminder (teleconference information and agenda).
Logistics coordinator	During and immediately after the call	<ul style="list-style-type: none"> Take meeting notes and distribute to attendees. Gather and distribute feedback to SHIP leadership and to attendees. Document decisions regarding the agenda, location, and timing of the face-to-face meeting. Reserve the location for the face-to-face meeting. Solidify logistics details for the next meeting.
SHIP leadership	During and immediately after the call	<ul style="list-style-type: none"> Continue to emphasize the importance of network expansion and the benefits to all members of the network. Respond, as necessary, to feedback from the meeting. Ensure that the agenda and objectives for the face-to-face meeting are appropriately identified.
Network Expansion III –Partner Meeting: Face-to-face meeting between SHIP staff and mental health partners		
Logistics coordinator	4-6 weeks before the meeting	<ul style="list-style-type: none"> Reserve meeting venue and make arrangements for food, transportation, etc. as needed.
SHIP leadership	1-2 weeks before the meeting	<ul style="list-style-type: none"> Conduct, as appropriate, informal conversations with participants planning on attending the meeting. Conduct, as appropriate, Internet research related to the goals identified for the face-to-face meeting.
Logistics coordinator	1-2 weeks before the meeting	<ul style="list-style-type: none"> Confirm meeting venue reservations and other arrangements Distribute a meeting reminder including meeting location, time, and travel directions.
Logistics coordinator	During and immediately after the meeting	<ul style="list-style-type: none"> Take meeting notes and distribute to attendees. Gather and distribute feedback to SHIP leadership and to attendees. Document decisions regarding next steps and the “owner” of those next steps.
SHIP leadership	During and immediately after the meeting	<ul style="list-style-type: none"> Ensure that the agenda set in the second teleconference is followed and objectives met. Lead the completion of action items identified at the meeting. Ensure that SHIP staff have the time allocated to perform tasks agreed to at the meeting. Foster network connections between the SHIP organization and partners.

Distributing Meeting Notes and Making Action Plans

You can use traditional electronic means, such as e-mail, to send meeting notes and to make plans for further discussion and sharing of contacts. You may also want to explore two less traditional electronic means of community building:

- ❖ Wikis
- ❖ Blogs

Wikis and blogs are pages that allow collaborative and informal writing to be disseminated via the web. With a wiki, for example, any visitor to the wiki can add pages or edit content. Blogs can also be set up to allow submissions from multiple people. Blog entries are typically organized in chronological order (in contrast to a wiki).

With a quick web search, you can find directions for setting up wikis or blogs. There are free services you can use, or you can use your own server. Directions are provided on the sites; setting up a blog can be accomplished in less than 5 minutes.

Figure 2-2 outlines useful tips for running all three meetings.

Figure 2-2: Tips for Running Network Expansion Meetings

- *Assign a meeting coordinator and notes taker — to handle meeting logistics, capture action items, and document results from meetings*
- *Use the two conference calls to generate excitement about the face-to-face meeting*
- *Highlight the time savings — a strong network is the most efficient way to give people the help they need*
- *Use each meeting to plan for (and gain commitment to) the next meeting*
- *Ask meeting attendees to draw on networking skills from both their professional and personal lives (for example, keeping in touch with friends and family members)*
- *Show, in word and deed, that commitment to network expansion comes from the SHIP Director's office*

Toolkit for Conducting Network Expansion Activities

Printouts of the toolkit are located in Appendix A and electronic copies can be found on the accompanying CD. The documents contained in the toolkit are as follows:

1. **Network Expansion Meeting Support Slides:** Network Expansion Meeting I, II, and III slides. Please note that the slides will need to be adapted with local information prior to use. Complete instructions are located in the notes section of the file.
2. **Partner Marketing Material Template:** for use in preparing an invitation for mental health partners to join in network expansion activities.
3. **Sample Agenda:** example of an agenda to support the Network Expansion III meeting.
4. **Sample Meeting Report-out:** example of a document used to provide information to network partners upon completion of Network Expansion I, II, or III activities.
5. **Sample Partner Matrix:** example of a partner matrix completed during network expansion activities that provides contact information and organizational capability statements.

The opening slide is shown in Figure 2-3. Look on the accompanying CD for the Presentation file.

Figure 2-3: Opening Slide of the Network Expansion Training





Summary

Consider the possibility of your SHIP organization participating in a multidisciplinary network with the primary purpose of supporting people with mental illness. The benefits are clear: better services provided to an underserved population, more efficient use of everyone's time, and more help for SHIP counselors.

You can catalyze the development of that network using the network expansion toolkit provided in Appendix A and the electronic files included on the CD.