Sexual and Reproductive Health Meeting Toolkit

April 2014

LIFE AFTER 40

National Family Planning & Reproductive Health Association

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Foreword

The American South has historically had limited access to family planning and sexual health services and thus poor health outcomes, such as high rates of unintended pregnancies and alarming rates of sexually transmitted diseases (STD), including HIV. While myriad family planning, STD, and HIV/AIDS organizations have invested resources to improve specific health outcomes, this work is often done in silos.

Recognizing that an opportunity could be created to better coordinate efforts across a spectrum of sexual and reproductive health (SRH) stakeholders, NFPRHA, along with the National Coalition of STD Directors and the New Morning Foundation ("the sponsors"), established a meeting series focused on improving coordination and SRH outcomes in the region. The meeting series, Sexual and Reproductive Health in the South, *provided an opportunity for stakeholders engaged in efforts to support and expand SRH in the South to convene, share information, and coordinate work to help improve health outcomes and ensure the accessibility of high-quality health services. The sponsors aimed to create an opportunity for participants to gain a greater understanding of what is being done in their own states and across a group of states, as well as document successes and resources in the hopes of helping other states with similar strategic efforts.*

Several NFPRHA members participated in the pilot meetings and, after concluding the series, NFPRHA is confident that its membership could benefit from this type of convening. As a result, NFPRHA created this template, which includes the techniques, tools, and resources used to plan and conduct this type of meeting.

Section 1: Introduction

This toolkit is designed to help NFPRHA members create opportunities for strengthening relationships with others working in the field of SRH by fostering conversation, collaboration, and partnership. The participants of the pilot meetings were able to meet as a group to have thoughtful conversations about their shared circumstances. This toolkit is intended to help stakeholders working in the field of SRH to break down the silos that often exist between the sectors of family planning, STD, and HIV/AIDS. However, this project may have applicable lessons for other sectors.

The concept for this meeting was devised in May 2013, and the first meeting was scheduled for September 2013. In the five months from the idea's formation to execution, the sponsors created all of the documents included in this toolkit. After the September meeting, the sponsors took another five months to fine-tune the tools and plan a second meeting in New Orleans, held in February 2014. This 10-month process allowed the sponsors to test their methods to ensure the meeting accomplished the intended goals.

Document 1 of the Appendix is a work plan that can be used as a road map to implement the planning process in three months from idea initiation to the date of the meeting. As with all materials in this toolkit, you should tailor the work plan to best meet your needs and time constraints. For this reason, NFPRHA has created customizable versions of all Appendix documents, which are available online at www.LA40resources.org.

Section 2: Setting the stage

Put together a planning team

Eight staff members from the three sponsoring organizations made up the planning team for the pilot meetings. This team included thought leaders to guide the direction of the project, as well as project managers to accomplish all of the tasks included in the work plan. The planning team members came from different sectors, which provided credibility with participants when invitations were extended across sectors. This eight-person team was also used to staff the meeting; information on staffing patterns is included in Section 3.

As you assemble your planning team, it is important to include individuals who have credibility among the individual sectors that you intend to include in your meeting. It is also important to include individuals in your planning team that will have time to devote to completing the daily tasks described throughout this toolkit. Document 1 of the Appendix lists the various tasks that need to be accomplished in advance of the meeting. Ideally, you will want to enlist one member of your planning team to lead the planning process. This team member is also ideally situated to be the liaison between the planning team and the participants. The sponsors found that it worked best to have all participant correspondence come from one person on the planning team.

Identify goals and objectives

Before embarking down the path of planning a meeting, you will need work with part or all of your planning team to identify goals and corresponding objectives. The goal statement will be the keystone to which you can return when strategic questions arise during the planning process. The sponsors' planning team met as a group to devise the following goal:

> "The purpose of the meeting is to gather stakeholders engaged in efforts to support and expand SRH to share information and foster opportunities for coordination to help improve health outcomes and ensure the accessibility of high-quality SRH services in five Southern states."

Once the goal statement is agreed upon, your planning team will need to identify the objectives that will successfully accomplish your goal. It is important to achieve consensus during this task because the objectives will be used to shape the participant activities for the meeting. The sponsors agreed upon the objectives listed below for their pilot project:

- A greater understanding of who within their state is working to support SRH, what successes they have had, and what resources they may be willing to share.
- A greater understanding of what the states are doing to advance SRH, their successes, and their resources.
- A greater understanding of the SRH challenges and opportunities faced within each of the states.
- A list of next steps that participants from each state would like to take upon leaving the meeting.
- Greater understanding among the sponsors of the resources, priorities, critical needs, and next steps of states represented at the meeting.

The sponsors' goal and outcomes are also included as **Document 2** of the Appendix.

As your meeting planning progresses, various stakeholders may want to know what you intend to accomplish before they commit their participation. To help answer these types of questions, the sponsors frequently used a public-facing document that included the concept for the meeting and the goal they hoped to accomplish. **Document 3** of the Appendix is a concept memo that can be formatted to inform stakeholders, including potential participants and funders.

Identify participants

The sponsors put much consideration into how to achieve their desired outcomes of high rates of participation of stakeholders within the geographic region and maximum opportunity for meaningful dialogue. It was decided that hosting two smaller meetings, rather than one large conference, would provide an intimate setting most conducive to information sharing.

The guest list for each state included people who work directly in the sectors of family planning, STD, and HIV/AIDS. These sectors were specifically chosen because the work had a high probability of intersecting, which would lead to logical collaborations. To achieve this makeup, the sponsors reached out to public-sector representatives such as state health officials from STD, HIV/AIDS, and family planning programs. Additionally, the sponsors researched private-sector representatives such as AIDS service organizations, family planning health centers, and state SRH-focused advocacy groups. The sponsors then extended invitations to employees at the administrator, director, or CEO level. Because the intended goal of the meeting was to focus on higher-level conversations about the organizations' strategic direction and how they intersect, might be duplicative, or strengthened, it was important for participating organizations to send thought leaders and decision-makers.

As the guest list took shape, the sponsors identified several entities that did not fit the role of "participant" as defined above, but are certainly stakeholders in the SRH community. As a result, the sponsors created a role of "observers" for those whose organizations are active at the state, regional, or national level in the SRH community, but do not have direct ties to health care services within the state(s). The observer guest list included national advocacy organizations working in SRH, national public sector partners working in SRH (such as agencies of the US Department of Health and Human Services), and private foundations committed to supporting SRH work. By observing the discussions, these individuals were able to gain insight into the issues facing service delivery providers that will help to better inform their work. These individuals also had information to give the participants about resources available related to the needs they expressed during the discussion.

Document 4 of the Appendix is a guideline that can serve as a starting point for your planning team to develop its own parameters for inviting participants. As invitations are sent, you will likely encounter stakeholders not on your radar who express interest in attending the meeting. Because the creation of a final participant list is an evolving process, it is important that all members of the planning team come to a consensus about the guidelines for invitations before these questions arise.

Section 3: Getting started

Creating a meeting agenda

The sponsors arranged each pilot meeting to occur over the course of three days. Participants convened on a Sunday afternoon to view a presentation, followed by a networking reception with their peers. The meeting content began in earnest on Monday morning, running into Tuesday afternoon. More details about specific meeting content are included throughout this section. Recreating this setup will require participants to be available for two full days of activities plus an evening of networking opportunities prior to content. A sample schedule is included below. Participants received an agenda prior to the meeting, a sample of which is included in the Appendix as **Document 5**.

	Sunday	Monday	Tuesday
8:00		**Breakfast**	**Working Breakfast**
9:00		**Welcome and Introductions**	**Presentation 2**
10:00		**Breakout 1**	**Breakout 3**
11:00		**Lunch**	**Report 3**
12:00			**Lunch**
1:00		**Report 1**	
2:00		**Breakout 2**	**Breakout 4**
3:00		**Report 2**	**Report 4**
4:00	**Presentation 1**	**Conclusion of Day 1**	**Conclusion of Day 2**
5:00	**Welcome Reception**		
6:00	**Dinner**	**Dinner**	
7:00			
8:00			
9:00			

Presentations

The Kaiser Family Foundation conducted the opening presentation of the February meeting, which contained scene setting information on to the state of health and health care in the participants' region. A member of the Association of State and Territorial Health Officials (ASTHO) gave a presentation on during the two-day meeting focused on the elements of successful projects that integrate primary care and public health. If you decide to include presentation content in your meeting, it may be beneficial to include content that focuses on the future of health and health care, as well as success stories of partnerships or program integration. To help you envision potential content to include in your meeting, the aforementioned presentations are included as **Document 6** in the Appendix.

Networking

The pilot meetings presented an opportunity for many participants to meet each other for the first time. The sponsors knew it was important to give ample time for networking as a way for participants to become acquainted with one another, especially if they were expected to be comfortable sharing a significant amount of information about their programs. Therefore, the meeting included time set aside for socializing that did not contain program content. The sponsors refrained from scheduling content during lunches and also arranged small dinner groups of five to eight participants, each at separate restaurants. Meeting evaluations showed that this dinner time was overwhelmingly popular among participants and led to greater collegiality among the group.

It will be important for you to be cognizant of these participant interactions as you prepare your own meeting. If you are bringing together a group of relative strangers, it will be important to build in time that will foster a comfort level among the group.

Breakouts

The sponsors centered their meetings around a set of breakout sessions where the majority of objectives discussed in Section 2 were accomplished. The goal of these interactions was for participants to break out into small groups to have rich discussions centered on the meeting objectives. Facilitators were assigned to each of the groups to keep the discussion on track and accomplish all of the tasks, as well as to record the information shared by the group. The sponsor planning team members acted as facilitators. **Document 7** of the Appendix is a set of instructions that the sponsors wrote for facilitators to ensure the breakout sessions were running on time and accomplishing agreed upon tasks.

Document 7 also includes the discussion topics used during the breakout sessions. As you plan your meeting, it will be important for you to determine the goal of each session and what your discussion topics will include. It will also be necessary for you to determine who will facilitate each of the groups. Although your facilitator should ideally not be a participant of the group, it may not be feasible for you to engage enough external individuals to conduct the sessions. Your planning team will need to set guidelines for participation if your facilitators come from the pool of participants.

Reports

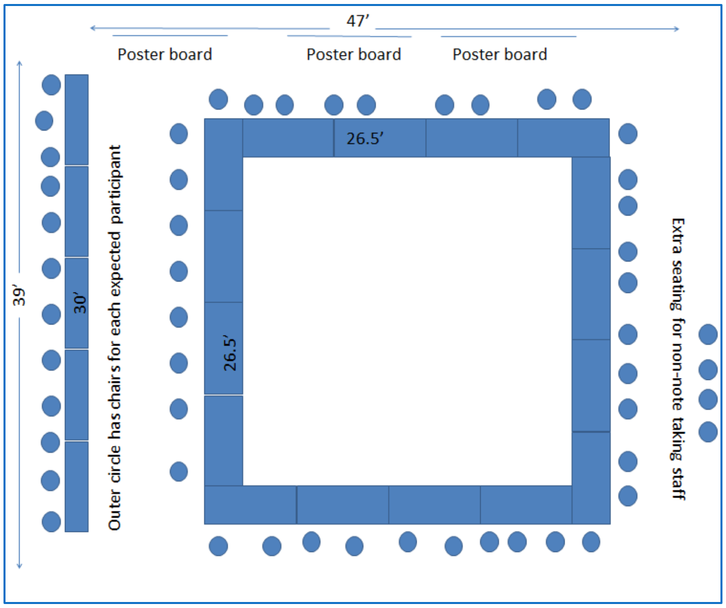
The sponsors agreed that it was important for the information discussed in the small group breakout sessions to be shared with the larger group of participants; the larger group might be able to provide solutions for problems discussed during the breakout, or may pick up new strategies as a result of the discussion.

The pilot meetings included a corresponding reporting session with the larger group for each small group breakout session. At the end of each breakout, the facilitator helped the small group's reporter complete the report "cheat sheet," **Document 8** of the Appendix, with three to five salient points from the discussion. The cheat sheet helped the reporter recall the discussion without requiring the reporter to focus on taking notes throughout the breakout discussion, which may distract the participant from fully engaging in discussion.

If you choose to provide the larger group with a recap of the breakout sessions, your facilitator can assist in the transfer of knowledge to the rest of the participants. Visual aids posted throughout the room can be used to post the discussion points from the small group. The sponsors found that it was beneficial to have these visual aids displayed throughout the entire meeting. **Document 9** of the Appendix provides an example of how the sponsors configured the display boards.

Location and staging

During the planning stage of the pilot meetings, the sponsors put a premium on securing locations that offered private space to stage each of the breakout sessions. Once you have determined the number of participants for your own meeting, it will be important to find a location that can accommodate all of your participants, both as one large group and as several breakout groups. A diagram of the seating chart for the large group meeting room is included on the following page.



Section 4: Participant Preparation

Participants were contacted multiple times prior to convening the meeting. Some of the interactions were standard practice (invitations), while others were unique (constituency calls) but necessary because of what was attempting to be accomplished among relative strangers. A timeline for conducting these activities is included within the sample work plan mentioned in Section 1 (Document 1).

Invitations

This part of the meeting process is fairly straightforward. The sponsors found that including the concept memo (Document 3) helped to clarify the intent and preemptively answer questions. **Document 10** of the Appendix is a sample invitation.

Biographies

As previously mentioned, this meeting resulted in a group of people unfamiliar with each other being asked to work closely together. Based on feedback from the first meeting, the sponsors determined that it was important to provide the tools for the participants to get to know one another as quickly as possible. As a result, the sponsors collected and distributed biographical information to help underscore why each participant was an integral part of the meeting. Your planning team should request biographies of participants in advance of the meeting, as well as provide participants with the sample included in **Document 11** of the Appendix.

Pre-work

The sponsors knew that in order to have a successful meeting, it was important for participants to enter into the meeting with a comfortable grasp of the information they were expected to share. To help facilitate this, a worksheet was created for participants to complete with other staff within their organizations (if needed). The participants received the worksheet electronically approximately one month prior to the meeting to ensure that they had ample time to familiarize themselves with the material. The pre-meeting worksheet is included in the Appendix as **Document 12**. As you develop your meeting, it would be important to review the sample worksheet to ensure that it includes topics that are applicable to your meeting's goals and objectives.

Stakeholder briefing calls

While the worksheet was created as a means to help convey expectations prior to the meeting date, the sponsors also found that it was important to speak with the stakeholders individually prior to the meeting to explain the sponsors' intentions. While not essential for a successful meeting, these calls may help you preemptively answer questions that may arise at the meeting. A sample agenda is included in the Appendix as **Document 13**.

Preparing your team for the meeting

The sponsors had eight staff members to assist with each pilot meeting. Several members of this group took on the role of small group facilitator. The other staff members who were not facilitating small groups supervised the behind-the-scenes tasks that took place during the meeting, as well as liaised with the hotel staff on catering, A/V, guest accommodation issues, and all of the other details that come along with hosting a meeting. A sample staff agenda, included in the Appendix as **Document 14**, will help you envision all of the tasks you may need to complete during the course of the meeting.

Moderator

The sponsors tried two different approaches to moderating the pilot meetings. The first meeting included a professional facilitator, who acted solely as a moderator for the large group sessions. This individual also helped to achieve consensus amongst the planning team during the creation of the meeting goals and objectives. The role of the moderator is important as a way to synthesize ideas and keep the meeting running on time, but is not overly time consuming. Therefore, the sponsors found that it was more cost effective to fill this role with internal staff, rather than hire an external consultant, for the second meeting. As a result, two members of the planning team moderated the second meeting.

As you plan your own meeting, it will be important to discuss the role of the moderator and whether this individual can come from the planning team.

Section 5: After the meeting

Now that you've hosted a successful meeting, it will be valuable for you to capitalize on the momentum and excitement that you created among the participants. But first, it is important to document all of the discussions from the course of the meeting. Doing so will provide your participants with a resource as they continue to work in the coalitions that were formed.

Evaluation

As with most meetings, the sponsors found that it was important to obtain feedback from participants about their experience during the meeting. An example of the sponsors' evaluation tool is included as **Document 15** of the Appendix.

Meeting summary

If all goes as planned, your meeting will be full of rich discussion – much of which happened in the small group breakout sessions. While there is a time for the large group to hear about the results of these discussions, inevitably not everything will be mentioned in the large group due to time constraints. It is also likely that your participants were actively involved in their small group discussions and did not take copious notes of the discussion. It will be important for your planning team to capture as much information as possible during the meeting. Members of the sponsors' planning team took turns taking notes during the large group reporting sessions; these notes were then compiled into a meeting summary. The facilitators were also responsible for taking notes during their small group session. The sponsors used the spreadsheet included in the Appendix as **Document 16** to collate these notes into a single document.

Once the meeting is over, your planning team should be prepared to pull all of this information into a report for the participants. The sponsors' Charleston meeting report is included in the Appendix as **Document 17**.

Keeping the momentum

While the sponsors achieved initial success of their goal during the pilot meetings, only time will tell what tactics successfully sustain the momentum of the meetings once participants go back to their daily routines. However, both pilot meetings generated lists of potential tasks for both the sponsors and the participants to complete as a means to continue a fruitful dialogue, such as: convening cross-sector participant calls; creating an online compendium of resources for all participants to access; and creating an email distribution list to help the participants share resources and pose questions amongst themselves. It was essential for the sponsors' planning team to document the requests made of them to help facilitate continued momentum and ensure that these items were acted upon. Your planning team will also need to be prepared to remain invested in this process for some time after the meeting adjourns.

Conclusion

Cross-sector collaborations are an increasingly important tool as safety-net family planning providers are asked to continue to do more with less. Building relationships that span beyond family planning will also help to ensure that your patients have access to a broad range of SRH services. NFPRHA hopes this toolkit provides you with useful resources and ideas for replicating a cross-sector meeting in your own community. As always, you are encouraged to reach out to NFPRHA if you have questions or need assistance with recreating this project.

For more information about using this toolkit in your state, contact Amanda Kelinson at 202.293.3114 ext. 215 or via email at akelinson@nfprha.org.