



CASE STUDY

Consumer Engagement through the Lahey Health Behavioral Services Consumer Advisory Board

CP: Lahey Health Behavioral Services

Beth Israel Lahey Health Behavioral Services (LHBS) is a private, nonprofit agency that provides mental health counseling, addiction treatment and family and school-based services to residents in greater Boston, the North Shore and the Merrimack Valley, Massachusetts.

TA Vendor: Advocates for Human Potential, Inc.

Advocates for Human Potential, Inc. (AHP) improves health and human services systems of care and business operations in the behavioral health space to help organizations and individuals reach their full potential.

Project Description:

AHP provided engagement support to help LHBS recruit members to attend their quarterly Consumer Advisory Board (Board) meetings. This engagement support included developing communications materials used by LHBS to recruit members and facilitating Board meetings.

TA Project Timeline: August - December 2020



Identified Challenge

LHBS sought engagement and communications support to develop and execute a strategy to encourage members to attend their Board meetings, which previously did not have members regularly in attendance.



Background

Prior to the TA project, LHBS held Board meetings quarterly, but members did not consistently attend. Holding Board meetings with members is a requirement of the CP program- and important to LHBS to inform their care provision so a reliable strategy for member attendance was imperative both for ensuring high-quality care and contract compliance. LHBS had worked with AHP previously and was familiar with their capabilities and possible TA offerings. They determined AHP was well-suited to support this TA scope.

TA Project Objectives

LHBS sought TA from AHP on consumer engagement to recruit members to attend Board meetings. The main goals of the TA project were to ensure regular attendance from members at Board meetings, implement a standard recruitment process, and develop materials to support ongoing member engagement in the Board.

TA Project Development

LHBS determined early on that AHP's writing and communications expertise would be the foundation of their TA engagement. AHP brought in a technical writer/graphic designer to support the LHBS team who produced recruitment flyers, a member charter and Board slide deck templates using member-centric language [See text box]. With AHP input, the LHBS team worked in parallel to clearly define the process for Board recruitment.

*[AHP's technical writer/designer] produced materials for us that **looked incredibly professional and knew the verbiage (to use to engage our members)** better than any of us would ever be able to know. She was responsible for all the tangible deliverables and **I don't think we would have had those had she not been part of the team.***

— LHBS TA project team member

Outcomes and Global Impact:

After LHBS implemented the new processes developed as part of TA project, four members joined the first re-vamped Board meeting. Multiple members attended two subsequent Board meetings as well. LHBS feedback from members confirms they prefer the virtual format because they do not need to worry about transportation to meetings or securing childcare. Members also reported they enjoyed having a group forum to communicate their feedback (without care coordinators in attendance). In turn, LHBS adopted a feedback review process: After every Board meeting, LHBS makes each piece of feedback into an action item with specific follow up steps, whose progress gets communicated back to the Board at the next meeting [See text box].

LHBS plans to continue the new Board member recruitment process moving forward. They reported that at each meeting they continue to iterate on the member engagement process and that they could not have made this progress without the processes and materials developed with AHP, which served as the foundation for their ongoing efforts. As a TA project team member explained, "We have such an amazing blueprint that we would not have had [without the TA]".

TA Activities

AHP implemented two main TA activities with LHBS as part of this TA project:

1

Developed strategies and materials for member recruitment to the Board and to be used as part of meetings. AHP developed a scope of practice manual, slide deck templates for the meetings, and strategies for members to get and stay engaged, including a flyer used to invite members to the Board meeting after they are nominated by their care coordinator.

2

Supported LHBS in defining a process for member recruitment to their Board. Prior to the TA project, care coordinators nominated Board members on an ad hoc basis and attended the meetings where their clients were present. However, member attendance was inconsistent. LHBS staff determined from conversations with members that they did not want to attend meetings and share experiences and suggestions about LHBS services with their care coordinators present. As a result, LHBS instituted a new process whereby each care coordinator must nominate at least one member to be engaged as a participant in the Board the following quarter (new members are recruited each quarter, though they can return the subsequent quarter if they would like). LHBS's Engagement Specialist reaches out to each nominee to invite them to the meeting and provide them with more information and the newly-developed recruitment materials. In response to member feedback, care coordinators no longer attend Board meetings.

As part of the new process spurred by the TA project, the Engagement Specialist has taken on a significant piece of the work to ensure a warm handoff from the nomination to the invitation and helps customize materials used in each meeting. The LHBS Engagement Specialist then works together with LHBS senior leadership to refine the slide decks for the upcoming meetings. Because of the Covid-19 pandemic, Board meetings scheduled during the TA project period were held virtually. AHP worked with the LHBS team to develop a Board charter and guidelines for these virtual meetings, including how to log on to the virtual platform and how to minimize cross-talk and interruptions. Finally, LHBS determined they would provide an incentive to members for joining a Board meeting- a \$25 grocery store gift card- and ensured they highlighted benefits of participating in the Board to members, such as being able to list it on a resume.

For example, we got feedback from members about wanting care coordinators back in homes [after that was eliminated during the pandemic]. We were already thinking about it anyway, so we took that back to senior leadership, made a plan, and we did have care coordinators go back in homes, even though it was still limited at that point. So, at the next meeting we provided that input to the providers: this was the feedback, this is what was done internally, and here are the results.

— LHBS TA project team member