



HEALTH MEANS

BUSINESS



Forum Handbook



U.S. CHAMBER OF COMMERCE FOUNDATION
Corporate Citizenship Center

#HMBCHAMPS
#OPPORTUNITY4HEALTH

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Most forums include a call to action, often given by a local policy or government leader. There is also a commitment made at the end of each forum about

what each stakeholder plans to do after the forum to advance the *Health Means Business* agenda.

III. Key Roles

The forum planning and event team consists of a chamber of commerce, a sponsor, and at least one community partner, such as the local health department, and a local foundation or coalition dedicated to building health and wellness. Additional key roles include the following:

Event planner(s) assist with the development of the forum’s agenda and content, speaker outreach, invitation outreach, venue, catering

and AV contracts, and on-site logistics staff, who handle registration and assist with the forum’s “run of show.”

Communications staff member(s) assist with the promotion of the event as well as speaker message points, social media outreach, earned media targeting, pitching, confirmations, on-site interview staffing, analytics, and follow-up.

IV. Timeline

Planning an event that brings together many different stakeholders—some of whom have never worked together—can take some time. *Health Means Business* Forums usually take about three to

six months to plan. In some cases, planning takes longer because of the necessary preparations needed to find a venue and a date that works for everyone.

FORUM CHECKLIST/TIMELINE

- 2-3 MONTHS OUT**
- Event Planner to Coordinate Planning Team Initial Call

- Event Planner to Secure Local Chamber of Commerce and Sponsor’s Logos
 - Share Logos with Admin Support/Art Department for Registration Website Banner and Agenda Document

- Event Planner to Schedule Weekly Team Calls Beginning 8-10 Weeks Out

- Local Chamber of Commerce and Sponsor’s to Secure Date and Location



FORUM CHECKLIST/TIMELINE *(continued)*

2-3 MONTHS OUT

- Local Chamber of Commerce and Sponsor to Develop Agenda and Speaker Discussion Points
- Local Chamber of Commerce and Sponsors to Invite Keynotes and Panel Speakers
- Local Chamber of Commerce and Sponsor to Confirm Speakers (Subject to Final Approval)
- Local Chamber of Commerce and Sponsors Determine Any Speaker AV Needs
- Event Planner to Draft Registration Link and Invitation Language and Share with Local Chamber of Commerce
- Event Planner to Share Registration Website Smart Link with Local Chamber of Commerce and Sponsor
- Local Chamber of Commerce and Sponsor to Contact Caterer, Secure Proposal, Sign Contract, Begin Processing Payment

1 MONTH OUT

- Event Planner to Schedule Speaker Calls for Each Session with Moderator, Local Chamber of Commerce and Sponsor. Moderator to Lead Calls.
- Local Chamber of Commerce and Sponsor to Gather Speaker Bios and Speaker Images

2 WEEKS OUT

- Event Planner to Draft Run of Show and Share with the Team
- Event Planner to Confirm Venue Will Provide a Minimum of 6 Easels, 6 Flip Charts with Adhesive Paper with Markers

1 WEEK OUT

- Local Chamber of Commerce and Sponsor to Print Speaker Table Tents and Event Signs
- Event Planner to Ensure All Event Materials Will Be at Venue Including Event Signs, Name Badges, and any Additional Event Materials
- Event Planner to Print and Review Attendee List with the Team



FORUM CHECKLIST/TIMELINE *(continued)*

1 TO 2 DAYS OUT

- Local Chamber of Commerce and Sponsor to Print Name Badges

- Team, Local Chamber of Commerce and Sponsor to go over Run of Show

- Local Chamber of Commerce and Sponsor to Print Copies of Forum Program & Provide Event and Speaker Attendee Gifts to Registration Team

DAY OF

- Team to Set Up Event Signs, Podium Signs, and Flip Charts

- Team to Set up Speaker Table Tents on Front of Room Speaker Table

- Team to Reserve Table in Audience at Front Right of Room for Speakers

- Team to ensure Chairs placed at Front of Room Speaker Table

- Local Chamber of Commerce and Sponsor to Place Printed Program on Registration Table

- Local Chamber of Commerce and Sponsor to Test AV (Podium Mic, Lav Mics, Hand Held Mics, Slides, Video)

- Event Planner to Place Social Media Tents on all Tables

- Local Chamber of Commerce to Set Registration Tables with Signage for Registrants and Press Check-In

- Event Planner to Bring List of Attendees and List of Breakout Session Attendees

- Local Chamber of Commerce to Arrange Name Badges/Set Up Laptop with Label Maker for Attendees who Did Not Register

1 TO 2 DAYS POST

- Event Planner to Draft Speaker Acknowledgements

1 TO 2 WEEKS POST

- Local Chamber to host Post-Event Debrief with the Team



V. Agenda

Health Means Business Forums are usually half-day events and incorporate a mix of plenary sessions, breakouts, and at least one healthy meal and sometimes an extra event—such as a tour of a health-oriented venue or a pre-event VIP cocktail reception or dinner. The ultimate goal of the forum is for stakeholders to consider the future of their community, to consider the links

between economic growth and community health, and to connect businesses with nonprofits and community coalitions in the local area that need private sector engagement.

Here is a sample template agenda and two successful agenda models from Indianapolis, IN and Cleveland, OH.

8:00 a.m. – 8:30 a.m.	Registration, Press Check In, and Healthy Breakfast Buffet
8:30 a.m. – 8:34 a.m.	Campaign Overview <i>U.S. Chamber of Commerce Foundation Executive and/or RWJF Executive</i>
8:34 a.m. – 8:35 a.m.	Healthy10 Promotional Video
8:35 a.m. – 8:40 a.m.	Welcome Remarks President and CEO, Local/Regional Chamber of Commerce
8:40 a.m. – 9:00 a.m.	CEO Keynote
9:00 a.m. – 9:15 a.m.	Audience Vital Issues moderated by Moderator <i>Seek input from the audience on vital issues facing the community.</i>
9:15 a.m. – 10:15 a.m.	Plenary Speakers: <i>Local organizations share their experiences about how nonprofits and businesses are impacting community health, education, the built environment, and other determinants of health.</i>
10:15 a.m. – 10:35 a.m.	Government Official Remarks and Call to Action TBD <i>Governor or Mayor invited.</i>
10:35 a.m. – 10:50 a.m.	Networking Break
10:50 a.m. – 11:50 a.m.	Audience Engagement Breakout Session <i>Plenary speakers plus 2 experts per topics. Problem-solving opportunity with support from plenary panelists and key community stakeholders.</i>
11:50 a.m. – 12:00 p.m.	Closing Remarks – Invitation to Networking Lunch <i>President and CEO, Local/Regional Chamber of Commerce</i>
12:00 p.m. – 1:00 p.m.	Networking Healthy Lunch

**One-on-one media interviews with USCCF and Chamber representatives scheduled throughout, time permitting.*

The Indianapolis *Health Means Business* Forum included only plenary sessions.



HEALTH MEANS BUSINESS

FEBRUARY 5, 2016 | INDIANAPOLIS, IN

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7:45 a.m. – 8:30 a.m.	Registration, Press Check-In, and Buffet Breakfast
8:30 a.m. – 8:40 a.m.	Welcome Remarks ▶ Kevin Brinegar, President and CEO, Indiana Chamber of Commerce
8:40 a.m. – 8:55 a.m.	Forum Opening ▶ Richard Crespin, Forum Moderator, U.S. Chamber of Commerce Foundation
8:55 a.m. – 9:00 a.m.	Health Means Business: Campaign Overview ▶ Dr. Jeff Lundy, Director, Health and Wellness Program, Corporate Citizenship Center, U.S. Chamber of Commerce Foundation
9:00 a.m. – 9:20 a.m.	INShape Indiana ▶ Jerome Adams, M.D., M.P.H., Indiana State Health Commissioner
9:20 a.m. – 9:30 a.m.	Indiana Healthy Community Initiative ▶ Chuck Gillespie, Executive Director, Wellness Council of Indiana
9:30 a.m. – 9:40 a.m.	Networking Break
9:40 a.m. – 10:00 a.m.	Keynote Address ▶ Carl L. Chapman, Chairman, President and Chief Executive Officer, Vectren Corporation
10:00 a.m. – 10:45 a.m.	Plenary Session I: Leaders in Design ▶ Richard Crespin, Forum Moderator, U.S. Chamber of Commerce Foundation ▶ Kim Irwin, MPH, Executive Director, Health by Design ▶ Steve Wagoner, Purdue University Extension, County Extension Director, Marion County ▶ Roberta Ressler, Global Actives to Products R&D Leader, Dow AgroSciences
10:45 a.m. – 10:55 a.m.	Networking Break
10:55 a.m. – 11:10 a.m.	Healthy, Wealthy, and Wise ▶ Dr. Michael J. Hicks, George and Frances Ball Professor of Economics and Director, Center for Business and Economic Research, Ball State University

The Cleveland *Health Means Business* Forum included both plenary and breakout sessions.



HEALTH MEANS BUSINESS

APRIL 6, 2016 | CLEVELAND, OH

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7:30 a.m. – 8:00 a.m.	Registration, Press Check-In, and Buffet Breakfast
8:00 a.m. – 8:05 a.m.	Welcome and Introductions > Joseph D. Roman, President and CEO, Greater Cleveland Partnership
8:05 a.m. – 8:15 a.m.	Welcome and Comments > The Honorable Frank Jackson, Mayor of Cleveland
8:15 a.m. – 8:30 a.m.	Forum Opening > Richard Crespin, Forum Moderator, U.S. Chamber of Commerce Foundation
8:30 a.m. – 8:35 a.m.	Health Means Business: Campaign Overview > Dr. Jeff Lundy, Director, Health and Wellness Program, Corporate Citizenship Center, U.S. Chamber of Commerce Foundation
8:35 a.m. – 8:45 a.m.	Robert Wood Johnson Foundation Culture of Health Vision > Dr. David Krol, Senior Program Officer, Robert Wood Johnson Foundation
8:45 a.m. – 9:30 a.m.	Plenary Session I: Healthy Community > Richard Crespin, Forum Moderator, U.S. Chamber of Commerce Foundation > Dr. Michael Anderson, Chief Medical Officer, University Hospitals > Greg Brown, Executive Director, PolicyBridge; Co-Chair, HIP-Cuyahoga > Robert E. Eckardt, Executive Vice President, The Cleveland Foundation > Len Komoroski, Chief Executive Officer, Cleveland Cavaliers > Amy Rohling McGee, President, Health Policy Institute of Ohio
9:30 a.m. – 9:45 a.m.	Networking Break
9:45 a.m. – 10:30 a.m.	Audience Engagement Breakout Sessions Topic I: Community Wellness (Ballroom A) > Patty Starr, Executive Director, Health Action Council (Moderator) > The Honorable Michael Summers, Mayor of Lakewood > Greg Brown, Executive Director, PolicyBridge; Co-Chair, HIP-Cuyahoga > Holly Hacker, Director, Direct Sales and Customer Experience, Vita-Mix Corporation > Natoya Walker Minor, Chief of Public Affairs, City of Cleveland



HEALTH MEANS BUSINESS

APRIL 6, 2016 | CLEVELAND, OH

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<p>9:45 a.m. – 10:30 a.m.</p>	<p>Topic II: Social Determinants of Health (Ballroom B)</p> <ul style="list-style-type: none"> ➤ Dr. David Krol, Senior Program Officer, Robert Wood Johnson Foundation (Moderator) ➤ Dr. Michael Anderson, Chief Medical Officer, University Hospitals ➤ Amy Rohling McGee, President, Health Policy Institute of Ohio ➤ Mary T. McSorley, Staff Vice President, Medicaid Product Development, Government Business Division, Anthem, Inc. ➤ Lauren Pennachio, Manager, Strategic Partnerships, Health Leads ➤ Mary Helen Petrus, Assistant Vice President, Community Development Department, Federal Reserve Bank of Cleveland <p>Topic III: Health Priorities for Education (University Hospitals Suite, 3rd Floor)</p> <ul style="list-style-type: none"> ➤ Simon Bisson, Interim President & CEO, Vice President, Resource Development, United Way of Greater Cleveland (Moderator) ➤ Zerrine Bailey, Program Manager, Alliance for a Healthier Generation ➤ John A. Carmichael, Chief Executive Officer, NewBridge Cleveland Center for Arts & Technology ➤ Joseph Vaughn, M.Ed., Educator: Executive Director, Food and Child Nutrition Services, Cleveland Metropolitan School District
<p>10:30 a.m. – 10:45 a.m.</p>	<p>Networking Break</p>
<p>10:45 a.m. – 10:50 a.m.</p>	<p>Audience Engagement Breakout Session Reports and Feedback</p>
<p>10:50 a.m. – 11:10 a.m.</p>	<p>Co-Keynote Address</p> <ul style="list-style-type: none"> ➤ John Carmichael, President, Pizza and Snacking Division, Nestlé ➤ Paul Bakus, President, Corporate Affairs, Nestlé
<p>11:10 a.m. – 11:55 a.m.</p>	<p>Plenary Session II: Healthy Workforce</p> <ul style="list-style-type: none"> ➤ Richard Crespin, Forum Moderator, U.S. Chamber of Commerce Foundation ➤ Thomas F. Zenty III, Chief Executive Officer, University Hospitals ➤ Bill Priemer, President and CEO, Hyland ➤ Dr. Tim Kowalski, Medical Officer, Progressive Insurance ➤ Dr. Teresa Koenig, Senior Medical Officer, Medical Mutual
<p>11:55 a.m. – 12:00 p.m.</p>	<p>Closing Remarks and Call to Action</p> <ul style="list-style-type: none"> ➤ Armond Budish, Cuyahoga County Executive
<p>12:00 p.m. – 1:00 p.m.</p>	<p>Networking Lunch</p>
<p>12:30 p.m. – 1:00 p.m.</p>	<p>Optional: Tour of the Global Center for Health Innovation</p> <ul style="list-style-type: none"> ➤ Fred M. DeGrandis, Chief Administrative Officer and Managing Director, Global Center for Health Innovation ➤ Armond Budish, Cuyahoga County Executive

VII. Logistics

There are a few logistical details that help create a successful event. These include the staging of the room and the speakers, and providing healthy meals and snacks that communicate the health and wellness message. It is also important to think about how to record via photography and video the day's events.

Staging of the Room

Setting the room with round tables and crescent-style seating creates an environment where attendees can see the presentations but still work within their tables on specific topics.

Staging of Speakers

Those speakers not in a plenary address the crowd from the podium or walk the stage with a lavalier microphone. Speakers for the plenary sessions speak from tables with hard microphones placed on the table; this setup allows speakers the opportunity to take notes during the session.

Breakouts

Breakouts offer attendees the option to select a topic and dig deeper into conversations on the

issue. Breakout room setup can be done with round tables and crescent-style seating, classroom seating, or U-shape seating.

Meals

Selecting the right caterer is an important detail. We often work with caterers who are members of the local chamber of commerce. Keeping meals and snacks healthy is key.

Recording the Event

All forums should be recorded via photographs and video in order to capture data that can be shared with attendees and the media post-event.

Small Touches

Whenever possible, organizers should provide speaker gifts as well as branded scratch pads and pens to help attendees capture ideas generated by the event. To make the event as sustainable as possible, consider every detail, including reusable or recyclable flatware, plates and cups, and other touches that will help communicate a broad definition of how to build a culture of health.



Attendees discuss the connections of health and economic opportunity at a Health Means Business Forum.



VIII. Promotion

It is important to promote the event as widely as possible in order to reach a wide audience. Promotion tends to take the form of earned media (news), paid media (advertising), social media, and word of mouth (i.e., direct email marketing or sharing through partner networks). The local chamber's business network is a key audience for the forums, and promotion to them to attend the event is the first step to a successful forum.

Here are a few tips from Kirsten Fedewa of Kirsten Fedewa & Associates, LLC. She was the communications lead for the regional forums:

Q & A with Kirsten Fedewa

Q: *What makes a forum newsworthy?*

A: The basic Ws are key to any event: who, what, where, when, and why. What makes this event and/or forum special and therefore newsworthy? What can be emphasized and promoted that sets this event apart—is it the date (for example, on a special holiday)? The location? The sponsoring organization? The topic and speakers? Lead with the most exciting news hook.

Q: *How do you identify the right media to invite to cover and attend?*

A: In the case of a *Health Means Business* Forum, reporters who should be invited are health and business reporters; however, with the downsizing of so many news outlets today, many reporters cover multiple areas of interest and topics. Often, it is best to contact the newsroom and ask the general editor about who might be interested in covering your event. Also, keep an eye on the news and see which beat reporters are covering your topics, as they are likely to be interested.

Q: *How does advertising play into the promotions? Is advertising necessary?*

A: Advertising is not necessary, but a small investment often yields big dividends. It is important to spend your advertising dollars wisely and to target publications whose readership reaches your target audience.

Q: *How do you handle the experience of reporters at the event in order to ensure coverage?*

A: Try to make the reporters feel that they are welcome; be sure they are briefed in advance, and then follow up with them by answering their questions in a timely and accurate way.

Q: *If you can't generate reporter interest, what can you do?*

A: Be creative. There are many ways to promote an event, with social media being high on the list. Inventory your assets and relationships to see how best to generate coverage. Remember the value of pictures of the event as a way to increase post-event interest.

Q: *What is the best way to use social media to promote your forum, both before and after the event?*

A: You can build momentum and excitement before, during, and after an event through social media. Start with a "save the date" and then fill in details as they are made available to the public. Just be sure to have a place for people to go once they are interested (i.e., a social media hashtag, a website, RSVP email address, and/or phone number).

Q: *What staffing do you need to ensure successful promotion and management of news at an event?*

A: This depends on the size of your event, your resources, and the media relations capability and experience of your team. At a minimum, you should have a media registration point of contact—someone available to greet and work with media by offering them background information, context, and someone to quote in their story.

