

HEALTH MEANS

BUSINESS



Forum Handbook



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I. Campaign Overview

The Health Means Business campaign is a two-year commitment by the U.S. Chamber of Commerce Foundation with support from the Robert Wood Johnson Foundation, in an unprecedented partnership with local and regional chambers, to foster business engagement in the wellness of our nation's communities.

Our goals are to create an enlightened national discussion that engages small, medium, and large businesses about the interdependency between health and economic empowerment and to build a culture of health in the United States. In addition, we plan to create a framework for continued engagement with our community partners, as well as for future analysis of the information we

learned, from interviews with business leaders during the *Health Means Business* campaign to take us beyond 2016.

There are numerous components to the campaign, including an online resource center, research, a national summit, an awards ceremony, and 10 regional forums across the United States during 2015 and 2016, which are at the core of the campaign. These regional forums serve as the model for additional state and local forums. This handbook provides practical information and tools for chambers of commerce and their community partners to use in order to create their own community forums dedicated to building a culture of health.

II. Forum Overview

Half-day forums engage local businesses and other key community stakeholders on the links between economic growth and community health, with the goal of building a greater culture of health in the United States. The forums are an opportunity for the business community to leverage the influence of local and regional business to discuss and develop an action plan for working with local stakeholders to address specific topics.

This handbook provides chambers of commerce leaders with information on how to host a local or regional *Health Means Business* Forum. There are detailed directions on every aspect of how to develop and implement a successful *Health Means Business* Forum, from developing the agenda and inviting the speakers to setting up the room and promoting the event.

Each forum includes a keynote address from a business leader outlining research about the economic imperative of building a culture of health; a corporate panel highlighting successful case studies; an expert panel exploring the specific health-related needs and priorities of the community; and audience engagement opportunities empowering attendees with concrete ideas and tools to create a healthier, more prosperous community. While there is no limit on size, the regional campaign forums have ranged from 75 to 200 audience stakeholders.

Communities can adapt the forum model to suit the needs of the chamber and participating community stakeholders. We have included two sample agendas and lists of typical expert speakers from the health, business, education, and policy arenas.

¹ Health Means Business refers to the campaign by the U.S. Chamber of Commerce Foundation. Campaign materials are freely available to all chambers that agree to certain guidelines. To use the Health Means Business name and branded materials, contact the U.S. Chamber of Commerce Foundation at ccc@uschamber.com.



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 I	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 MC	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 WE	EEKS 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 WE	EEK 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 U.S. Chamber of Commerce Foundation Executive and/or RWJF Executive
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 Seek input from the audience on vital issues facing the community.
9:15 a.m. – 10:15 a.m.	Plenary Speakers: Local organizations share their experiences about how nonprofits and businesses are impacting community health, education, the built environment, and other determinants of health.
10:15 a.m. – 10:35 a.m.	Government Official Remarks and Call to Action TBD Governor or Mayor invited.
10:35 a.m. – 10:50 a.m.	Networking Break
10:50 a.m. – 11:50 a.m.	Audience Engagement Breakout Session Plenary speakers plus 2 experts per topics. Problem-solving opportunity with support from plenary panelists and key community stakeholders.
11:50 a.m. – 12:00 p.m.	Closing Remarks - Invitation to Networking Lunch President and CEO, Local/Regional Chamber of Commerce
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.





FEBRUARY 5, 2016 | INDIANAPOLIS, IN

6 5			
	#OPPORTUNITY4HEALTH		
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 IndianaJerome 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 		
Plenary Session I: Leaders in Design Richard Crespin, Forum Moderator, U.S. Chamber of Comm Foundation Kim Irwin, MPH, Executive Director, Health by Design Steve Wagoner, Purdue University Extension, County Extension Dire Marion County Roberta Ressler, Global Actives to Products R&D Leader, 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 		





FEBRUARY 5, 2016 | INDIANAPOLIS, IN

#OPPORTUNITY4HEALTH

	Plenary Session II: Leaders in Community Health				
	> Richard Crespin, Forum Moderator, U.S. Chamber of Commerce				
11:10 a.m. – 11:55 a.m.	Foundation				
11.10 a.m. – 11.55 a.m.	➤ Lance Chrisman, Executive Director, Anthem Foundation				
	➤ Ron Gifford, CEO, JumpIN for Healthy Kids				
	➤ Richard Smith, Community Relations Manager, Indiana Pacers				
11,55 c m 10,00 n m	Closing Remarks and Call to Action				
11:55 a.m. – 12:00 p.m.	➤ Jim Schellinger, President, Indiana Economic Development Corporation				
12:00 p.m. – 1:00 p.m.	Networking Buffet Lunch				





APRIL 6, 2016 | CLEVELAND, OH

#OPPORTUNITY4HEALTH

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			





APRIL 6, 2016 | CLEVELAND, OH

#OPPORTUNITY4HEALTH

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9:45 a.m. – 10:30 a.m.	 Topic II: Social Determinants of Health (Ballroom B) 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 Topic III: Health Priorities for Education (University Hospitals Suite, 3rd Floor) 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 		
10:30 a.m. – 10:45 a.m.	Nutrition Services, Cleveland Metropolitan School District a.m. Networking Break		
10:45 a.m. – 10:50 a.m.	Audience Engagement Breakout Session Reports and Feedback		
Co-Keynote Address 10:50 a.m. – 11:10 a.m. Double Carmichael, President, Pizza and Snacking Division, Ness Paul Bakus, President, Corporate Affairs, Nestlé			
11:10 a.m. – 11:55 a.m.	Plenary Session II: Healthy Workforce > 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		
11:55 a.m. – 12:00 p.m.	Closing Remarks and Call to Action Armond Budish, Cuyahoga County Executive		
12:00 p.m. – 1:00 p.m.	Networking Lunch		
Optional: Tour of the Global Center for Health Innovation Fred M. DeGrandis, Chief Administrative Officer and Managing Global Center for Health Innovation Armond Budish, Cuyahoga County Executive			

PLENARY DISCUSSION GUIDE:

The Forum's Moderator will use the questions below, combined with questions produced during the "Vital Issues" session to guide the conversation. These questions will not be used verbatim. This is only a rough guide.

Questions

- > [All]: X percentage of X state get their health insurance at work and most of us spend at least a 1/3 of our time at work. What can businesses do to create more healthy workplaces?
- > What are the highest-impact/lowest-cost strategies employers can implement to improve the health and wellness of their employees?
- > What can small- and medium-sized businesses do?
- > What can businesses do to support community-wide health beyond the workplace?
- > When it comes to improving health and wellness, there's a lot of data already out there on what to do. What seems missing is the motivation to actually do it. How do we bridge the motivation gap? What are the right levers to pull?
- > What small changes could we these assembled leaders make that would create big improvements for community health?
- > We're about to go into breakout sessions. What challenge do you want to pose that you'd like to work through with your colleagues?
- ➤ What are 2-3 things that a leader in this audience could do tomorrow?

DRAFT INVITATION LANGUAGE:

Example Invitation Language:

Dear XX.

The Local Chamber of Commerce and the Sponsor invite you to join the [YOUR CITY] Health Means Business Forum.

I'm reaching out to invite you to the Forum on the topic of Health Means Business taking place on X date from X-X time at X location, location address. The forum will leverage the influence of local and regional businesses to empower healthier individuals and communities through the areas of education, employment, and income. Join prominent business and community leaders to discuss how together we can create a healthier [YOUR CITY].

If you would like to attend this Forum, please register at www.Registration Website.com/Forum. Spaces are limited to the first X number of registrants.



VI. Speakers

Health Means Business Forums bring together health, wellness, business, and policy leaders. When considering speakers, it is important to look for a balance of experienced and engaging experts and people who might be considered less obvious for a health and business forum. Chamber CEOs, mayors, and state government leaders can provide expert insight across the business and policy realms.

Include the chamber membership as speakers, but consider reaching beyond the chamber membership in order to increase impact, awareness, and reach. Several of *Health Means Business* Forums have also included speakers from local professional sports teams, such as the Cleveland Cavaliers and the Orlando Magic. Sports franchises are great partners: They combine health, community action, and business leadership. Hosting a speaker from a local team can boost the news value of your event, which can increase attendance. If the community does not have a sports franchise, consider a popular

local chef or author. Every community, no matter how large or small, has business, educational, and health leaders who are making an impact in the health and economic development in their community. To see the range of speakers from the regional forums, browse the national event speakers on the *Health Means Business* regional forums page healthmeansbusiness.com.

The Moderator

The moderator is the most important front-facing role of a successful event. The moderator must emcee the event in a way that is entertaining, educational, and also technically well orchestrated. When looking for a forum moderator, look for someone who has the right skills, energy, and expertise. He or she must be able to work with the speakers in advance to prepare them properly and create the right chemistry in the room; he or she must also keep a half-day forum moving on time and on target. Moderators will also help set the stage for next steps, post-forum, to ensure that the forum results in concrete community action.



Darrell Taylor from the Tampa Bay Buccaneers and Health Means Business event moderator Richard Crespin discuss the future of health at the Florida Health Means Business Forum.

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 crescentstyle 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 postevent 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.

IX. Conclusion

The cycles of good community health and good business are intertwined. The goal of the *Health Means Business* campaign is to inspire businesses to work collaboratively to create healthier communities.

Health Means Business forums are an effective first step in bringing together community and business partners to work collaboratively with a shared vision about the future of the community. However, the forums are just one component of a wider strategy. Forums are an initial way to bring together diverse allies; what happens next is even more important. Forums are set up to highlight the issues that each community cares about most and the ways that leaders are addressing them. The organizing team must capture the knowledge and create follow-up action.

Next steps can include forming a wellness committee at the local chamber to take the insights of the forum and formulate concrete actions. More information on how to form a wellness committee can be found on the *Health Means Business* online resource center website. If a health and business community coalition already exists, forum participants can be encouraged to join or provide input to the coalition and track outcomes. In addition, the *Health Means Business* Online

Resource Center provides a steady stream of national networking and education opportunities for its community (called *Health Means Business Champions*). The Champions Network connects businesses and individuals across the United States to share best practices on building a culture of health that results in vibrant, economically strong communities. It's easy to become a champion. Sign up at www.uschamberfoundation.org/health-means-business-resource-center to share stories and to receive information, encouragement, and connection.

In sum, it is important to understand why communities need better health and how the interplay of social factors affects health and economic outcomes. This campaign highlights both the urgency and opportunity across the United States. Businesses can take action to increase the health of their communities and, by doing so, build long-term economic vitality. The Health Means Business team at the U.S. Chamber of Commerce Foundation is excited by the interest and enthusiasm that has been generated by the campaign, and we look forward to working with partners through the country to be part of this exciting campaign.

www.uschamberfoundation.org/health-champions







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