

**American College of Cardiology
Foundation**
**CardioSmart Community
Engagement Event Template**



CardioSmart Atlanta Storyboard

Description: ACCF partnered with its Georgia Chapter to pilot a live patient education and engagement event in conjunction with the ACC.10 Scientific Session in Atlanta, Georgia. For this event—CardioSmart Atlanta—the ACC Georgia Chapter members reached out to the underserved community of Atlanta, and to the patients they serve from the greater-Atlanta region, to engage them in and teach them about the benefits that come from managing their own health.

Objectives:

- empower individuals with key information so they can make informed care decisions
- improve outcomes for CV patients through partnership with their physicians and care team
- reduce ethnic and gender-related disparities in care
- focus on disease prevention – not disease intervention

Specific Aim: To reach out to the local Atlanta community (primarily the underserved, African American population) to engage and educate them in the management of their own heart health.

Measure of Success:

- 1.) **Number of attendees:** Target 1000 attendees; 700 screenings
- 2.) **Attendee satisfaction:** 85% satisfied through a Likert-based survey

Secondary Aim: To launch a successful patient outreach pilot event for ACC Chapters to model in developing their own patient outreach programs.

Measure of Success:

- 1.) **Ga. Member satisfaction:** 85% of participating members satisfied (Likert-based survey)

Event Outline (reflects final numbers)

Title: CardioSmart Atlanta

Date: Saturday, March 13, 2010

Time: 9 a.m. to 2 p.m.

Location: Omni Hotel, Downtown Atlanta

Total Screened: ~250

Total in Attendance: ~450

Community Partners: 25

Chapter Volunteers: 50

Volunteers: More than 100 (this number includes screening volunteers)

Program Elements:

- Blood pressure screenings performed by GA Chapter CCA members (12 stations)
- Individual patient counseling performed by GA Chapter physician members (20 stations w/back-up)
- Educational programming focused on healthy living, hypertension, atrial fibrillation, heart failure, and special topics
- Slide sets
- CardioSmart tutorials and sign-up
- Guideline-based Patient Toolkits
- Kids program with nutritionist and physical activity
- CardioSmart passports
- Exhibits for sponsors and partners
- Food and beverage (need to be sponsored)
- Incentives and giveaways (to be sponsored) – T-shirt, pedometer, etc.

Roles and Responsibilities:

- **BP Screenings** – GA Chapter will organize, recruit volunteers and staff
- **Education Sessions** – GA Chapter will plan sessions and recruit speakers
- **Partnership Outreach** – ACC National's Corporate Development team will facilitate and coordinate, relying upon GA Chapter as needed for support
- **Business Development/Sponsorship** – ACC National's Business Development team will facilitate and formalize with the assistance of Crosby-Volmer for local outreach
- **Community Awareness/Promotions** – ACC National's Corporate Development team will plan and develop materials, relying upon the GA Chapter as needed for support
- **Media Outreach** – ACC National's Communications Team will formulate a plan seeking the assistance of ACC National (for national media) and GA Chapter members for support (for local/grassroots media); ACC National staff will attend to media needs leading up to and on the day of the event
- **Logistics** – ACC National's staff team will oversee and coordinate logistics functions leading up to and on the day of the event

Lessons Learned:

- 1.) Partnering with another organization or event will help drive attendance and make it more successful than trying to do a standalone event. Bringing event to the community is recommended.
- 2.) Ensure there are not conflicting engagements the day of the program that might detract from audience participation and hinder the ability to reach target.
- 3.) Minimize the amount of educational "speaking" sessions, where the audience sits and listens. Interactive educational activities serve the public best and facilitate interest from attendees; small group sessions should also be kept to a minimum.
- 4.) Cooking and fitness demonstrations are hugely successful.
- 5.) A professional screening company is recommended to handle all aspects of the screening, with the exception of the one-on-one counseling session for which ACC members are recommended.
- 6.) Establish a kids program early as it will be the basis for many activities and sponsors.
- 7.) Hold an organized volunteer meeting prior to the event to walk through the floor plan, day's activities, as well as roles and responsibilities.

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CardioSmart Template

FREQUETLY ASKED QUESTIONS

1. How can education be incorporated into the event?
 - a. Education can be provided to participants through the one-on-one counseling sessions with physicians. Physicians can also refer participants to the American College of Cardiology's patient-facing website, CardioSmart for more educational materials on heart health.
2. What types of presentations should there be at the event?
 - a. Presentations should be interactive for the participants. Examples are exercise and cooking demonstrations. Lectures and PowerPoint presentations should be kept to a minimum.
3. Where should the event be held?
 - a. The event should be held in a location that is easily accessible to your target audience. Keep in mind your target attendance when determining venues. You want to be sure that participants have enough room to move around. Bringing the event to the community will make it more successful. Partnering with another organization or event will help drive attendance.
4. What is the budget for community engagement event?
 - a. The budget will vary depending on the size and scope of your event.
5. Can children be screened?
 - a. Yes, as long as they have written parental permission. (See Attachment IV.d)
6. Who should participate from the chapter?
 - a. Physicians, CCAs, Pharmacists, FITs
7. Who should conduct the screenings at the event?
 - a. Use of a screening company or a screening coordinator is highly recommended, relying solely on member volunteers for consultations to the largest extent possible.
8. What community partners should you reach out to?
 - a. Senior centers, clergy, YMCA, sororities and fraternities, Boys & Girls Clubs, Chamber of Commerce, Department of Health, City Youth Commissioner, etc
9. What is the appropriate involvement for Pharma companies?
 - a. Pharma companies can co-sponsor and attach their marks to any materials produced, but should avoid exhibiting for fear of the appearance of ACC endorsement of specific products.

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CardioSmart Template

Timeline

6 TO 12 MONTHS OUT

- Establish goals and objectives
- Chapter President selects Program Chair(s) for event
- Program Chair selects planning committee :
 - o Need to define roles and responsibilities of committee members and assign them in advance.
Key "roles" include:
 1. Outreach to community
 2. Sponsors & community partners
 3. PR/Marketing
 4. Screenings & consultations (screening company is recommended)
 5. Children's activities
- Educate Committee on CardioSmart (See Attachment VI)
- Identify target audience
- Design the program using the CardioSmart logo as an anchor (See Attachment VI)
 - o Select a theme, design a "logo" with the assistance of ACC National.
 - o Design program well enough in advance to enlist sponsors to provide/support specific items; for example, raffle prizes, children's program
- Select a date and time. Check for possible conflicts/barriers (for example, parades, other major events) that may affect ease of access or attendance
- Select and reserve the location that can accommodate the largest number of participants in a convenient location; prepare diagram of room to include all anticipated elements of the Fair: screenings, exhibits, registration, children's program, etc.; include electrical locations if possible
- Identify your key constituents who can make the event successful, ie. hospital and health systems, religious and civic organizations; consumer organizations; pediatric centers for the children screenings; government or public health agencies; and pharmaceutical companies.
- Identify possible sponsors, community partners, media partners, services, information, exhibits, and activities. (See Attachment I.a)
 - o Start early to get into a company's budget cycle: ask at least 9 months in advance and be persistent
 - o Get the members involved. Local companies are more likely to lend support if organizers are directly involved in outreach
 - o Media sponsors can help promote the meeting; try to recruit a broadcast sponsor & a print sponsor; be sure to have developed a communications plan
- Confirm and Follow up with interested sponsors- On going (See Attachment II.a)
 - o Secure logo if needed
 - o Secure payment if applicable
- Prepare a budget. (See Attachment III.d)

3 TO 6 MONTHS OUT

- Establish timelines
- Secure commitments from health care providers, sponsors, exhibitors, etc.
- Ask exhibitors, clinicians, and other people working the event to reserve the selected date.
- Secure volunteers, including
 - o Greeters
 - o Ambassadors (for directional assistance)
 - o Photographer

- Translators
- Select health screenings and services to be offered
- Decide on exhibits, activities, demonstrations, etc.
- Reserve rental equipment
- Reserve tables and chairs
- Create a vendor needs-assessment form. The form should include event date, setup time, directions, & parking info (See Attachment II.b)
- Secure parking and any food arrangements for volunteers (participants & vendors)
- Coordinate design and printing of posters, flyers, etc.
- Plan layout and flow: consider traffic flow and the potential for waiting lines for screenings (See Attachment III.a)
- Determine how volunteers will be distinguished (i.e. name tags or t-shirt)

1 TO 3 MONTHS OUT

- Order/develop CardioSmart and educational materials from ACC National. (See Attachments IV.b and IV.c)
- Plan and secure prizes, decorations (including tablecloths), goodie bags, giveaways, films, etc.
- Make posters, flyers, etc. to publicize the event. (See Attachment I.e)
- Duplicate printed materials, such as registration and evaluation forms. (See Attachment IV.d)
- Confirm needed equipment (chairs, tables, and other necessary supplies).
- Continue to follow up with interested exhibitors, providers, and volunteers to ensure their commitment.
- Determine who will be responsible for those referred for care (i.e. screening company, members or other)
- Provide written confirmation to those "exhibiting"; include as reference: (See Attachment II.b)
 - Date of event
 - Time (to set up booth and hours open to public)
 - Location (include a map)
 - General guidelines
 - Form to complete for electrical, internet requirements, extension cords, and other items.
 - Include cost to exhibitor and place to provide credit card/payment information.
 - Description if one will be included in program (be sure to limit # of words).

3 WEEKS TO 1 MONTH OUT

- Provide written confirmations to volunteer and speakers (See Attachments II.c & II.d)
- Assign vendor display areas based on electrical needs
- Meet with committee chairs to review progress towards implementation of plans.
- Publicize the event with flyers, posters, etc.
- Contact broadcast media sponsors to publicize on television, radio, and newspapers
- Finalize floor plan to include all elements of the event
- Make booth signs.
- Make map for exhibitors and participants.
- Create the program, acknowledging exhibitors, volunteers, donors, etc. (See Attachment IV.a)
- Make a list of items that still need to be purchased.
- Secure the following supplies for the "be prepared for anything kit":
- Hold a pre-event meeting for the committee and volunteers
- Double-check all supplies ordered
- Make list of where volunteers will be assigned the day of the event
- Finalize plan for the registration table and registration process; ensure it is acceptable to the screener

1 TO 3 WEEKS OUT

- Confirm with all sponsors, vendors, exhibitors

- Print map and program.
- Make exhibitor, volunteer, chairman, etc. nametags.
- Purchase perishable items, safely store, etc.
- Make list of where volunteers will be assigned the day of the event. (See Attachment III.a)
- Finalize plan for the registration table and registration process.
- Finalize plan for staffing, including command center table.
- Finalize plan for evaluation, including distribution and collection.
- Make vendor, volunteer, chairman, etc. nametags
- Purchase perishable items
- Hold informational conference call for volunteers

WEEK OF EVENT

- Stuff participants goodie bags/materials
- Set up tables, booths, exhibits, chairs, classrooms, etc.
- Bring supply kits
- Set up the registration table, including:
 - Sign-in/registration sheets, including addresses and phone numbers (If not done by a screening company)
 - Plenty of pens and pencils for participants
 - Maps of exhibits and programs
 - "Goody bags" for giveaways
- Assignment list for volunteers (See Attachment III.c)
- Set up the evaluation area, including forms for exhibitors and participants.
- Set up the food area.
- Make sure there are enough electrical cords, outlets, audiovisual equipment, etc.

DAY OF EVENT

- Set up as needed.
- Be ready one hour before opening.
- Hold final walk through with volunteers
- Collect registrations.
- Collect evaluations.
- Clean up area when necessary
- Greet vendors at the entrance and familiarize them with important areas
- Make arrangements for break time and/or lunch for vendors
- Be sure someone periodically walks through the fair to assess employee/vendor needs
- Maintain registration and refreshment tables throughout the event
- Estimate attendance

FOLLOW-UP

- Send thank you letters to exhibitors, volunteers, etc. (See Attachments V.a & V.b)
- Ensure proper follow-up has been put in place for all participants that we referred for care.
- Collect evaluations to determine how to improve the next event
- Tabulate evaluation results.
- Hold post-fair meeting with committee to discuss "lessons learned", successful ideas
- Determine and document possible improvements for next time.
- Report results to sponsors/exhibitors, media, etc., as appropriate
- Send a follow-up report and results of the evaluation to committee and others deemed appropriate

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CardioSmart Template

COMMITTEES

1. Event Chair(s)

- Forms Program Committee
- Maintains general over-site; s/he ensures mission carried out
- Inform Chapter on the event (See Attachment I.b)
- Recruits physicians & health care provider volunteers (See Attachment I.c)
- Defines and reviews all materials & handouts

2. Attendee Recruitment

- Recruit Participants
- Identify target audiences/groups, organizations
 - o Audience: seniors, adults, young adults, teens, children
 - o Groups/organizations: senior centers, clergy, YMCA, sororities and fraternities, Boys & Girls Clubs
- Recommend possible event locations
- Work closely with community to drive participation from the public

3. Sponsors & community partners

- Identify and enlist support of local business, organizations, non-profits, health clinics & systems
 - o Much of the success will depend upon ability to make these connections: identify early and pursue who a chapter wants as partners
- Develop sponsorship package including in-kind services to be offered (for example, health club for exercise, food/nutrition presentations, entertainment, etc) (See Attachment I.a)
- Reach out to the Chamber of Commerce, Department of Health, and City Youth Commissioner to see what resources they can provide
- Organize "prizes"/giveaways (See Attachment IV.e)
 - o Incorporate education into this by having participants visit vendors/exhibitors answering relevant questions along the way
- Work with PR/Marketing committee member to consider public relations agency support

4. PR/Marketing

- Try to acquire local media sponsors for print, radio and online promotion
- Seek a celebrity to attract additional participation and interact with attendees
- Take the lead in designing a marketing plan
- Determine onsite contact/process for media

5. Screenings & consultations

- Identify types of screenings; blood pressure, BMI, cholesterol, diabetes, total lipids, waist circumference
- Outline and implement screening process from start to finish
- Identify number of people you'd like to screen
- Identify who is going to do the screenings
 - o Strongly suggest Chapter hire outside company or partner with a group who has done screenings before
 - o If volunteers are used, determine what supplies are needed, who orders, & how to pay for them

- Determine how patient's information remains confidential
- Determine what to do if results of screening call for immediate attention or referral

6. Children's activities (See Attachment III.b)

- Pediatrician should take the lead to ensure activities are planned for children
- Secure a community partner(s) (such as a children's hospital) that can provide pediatric program

7. Chapter Executive

- Develop budget (See Attachment III.d) to include the following
 - o Publicity and promotion costs: design, printing, mailing, distributing, etc.
 - o Equipment, furniture, A/V etc
 - o Decorations: balloons, signs, tablecloths
 - o Refreshments and lunches for participants, volunteers, and people in booths
 - o Permits and insurance requirements
 - o Participant "give aways": bags, snacks, pedometers, etc.
 - o Screening: outside vendor, supplies, etc.
 - o Rental fee for facility
- Set policies for budget management and reimbursement of expenses. Identify the person responsible for writing and signing checks.
 - o How will deposits, reimbursements be handled?
 - o If there is a petty cash fund, who will maintain and authorize withdrawals?
 - o What is the deadline for submission of bills?
- Determine on-site coordinators to include:
 - > **Event Coordinator**
 - Recruit volunteers to set-up & tear down
 - Determine & secure equipment, A/V, furniture, supplies needed
 - Determine décor & signage
 - Décor such as balloons, tablecloths
 - Coordinate signage: directing participants to location, designating each area (screening, consultation, etc), acknowledging sponsors
 - Prepare and print all handout materials including participant brochure, registration form, program schedule, etc.)
 - Work with exhibitors
 - Facilitate collation of materials and/or stuffing of goodie bags
 - Organize any catering
 - Investigate and confirm parking arrangements
 - Facilitate development of something to identify volunteers (badge, pin, t-shirt, etc)
 - > **Registration Coordinator (if not a BP screening company)**
 - Train volunteers to staff different areas of registration such as volunteer check-in, screening sign-up, information desk, exhibitor sign-in
 - Supervise registration volunteers

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Supplies and Giveaways

- “Office” supplies
 - Pens and pencils
 - Felt-tipped markers—large, small, different colors
 - Extension cords
 - Paper clips, rubber bands, tacks, pins
 - Stapler and extra staples
 - Scotch, masking, and duct tape
 - Hammer, nails, pliers, and screwdriver
 - Poster board
 - Paper
 - Batteries
 - Emergency kit with first aid supplies
 - Trash cans/trash bags
 - Paper towels & spray cleaner
 - Kleenex

- Contact lists
 - Volunteers
 - Staff
 - Exhibitors

- Handtruck, cart

- Paper
 - Program Schedule (See Attachment IV.a)
 - Participant Brochure (See Attachment IV.b)
 - 2-part registration forms (See Attachment IV.d)
 - Raffle/prize cards (See Attachment IV.e)
 - CardioSmart Diploma (See Attachment IV.f)
 - CardioSmart Certificate of Attendance(See Attachment IV.g)
 - Map for exhibitors and participants

- Give- Aways
 - Pedometers
 - Stress Balls
 - Blood Pressure Monitors
 - Give cards for heart healthy food places or activities (i.e. Publix, Footlocker)

- Other Supplies
 - Computers
 - CardioSmart Business Cards (Order from ACC National)
 - CardioSmart Rx Pads (Order from ACC National)
 - Volunteer name tags

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CardioSmart Template

ATTACHMENTS

Contact cardiosmart@acc.org for more information on these attachments and to learn how the CardioSmart team can make your event CardioSmart.

- I. Partnership and Recruitment Materials
 - a. Partnership Package and Cover Letter
 - b. Chapter FAQ
 - c. Chapter Volunteer Recruitment Letter and Form
 - d. Chapter Volunteer Sign-Up Sheet
 - e. Participant Flier

- II. Confirmation Emails
 - a. Partner Confirmation Email
 - b. Partner Confirmation and Expo Information Email
 - c. Chapter Volunteer Confirmation Email
 - d. Speaker Confirmation Email

- III. Logistics Documents
 - a. Flow Diagrams 1 &2
 - b. Kids Program
 - c. Volunteer Sign-in Sheet
 - d. Budget

- IV. Participant Materials
 - a. Program Schedule
 - b. Participant Brochure
 - c. CardioSmart Educational Flyers
 - d. 2-part Registration Form
 - e. Raffle Card
 - f. CardioSmart Diploma
 - g. CardioSmart Certificate of Attendance

- V. Follow Up Materials
 - a. Partner Thank You Letter
 - b. Chapter Volunteer Thank You Letter