



Created by: HouseCalls Development Team  
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## PLAYBOOK

Improving Patients Perception of Healthcare  
A collaboration of East Bay Equity, Inclusion and Diversity  
(EID), Outpatient Quality (OPQ) and Chronic Conditions  
Management (CCM)

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# East Bay (EBY) HouseCalls Playbook

## Opening

The EBY HouseCalls Development team created this HouseCalls Playbook for anyone that is interested in using this platform to help close the disparity gap in the African American, Latinx and AAPI (Asian American Pacific Islander) communities. It is to support those interested in sharing their prevention and intervention strategies.

HouseCalls is a virtual platform to help us **S.E.E.** Kaiser Permanente communities.

- ❖ **Support** our African American, Latinx and AAPI members and communities to take control of their preventive care and chronic conditions.
- ❖ **Explore** and identify opportunities to improve care.
- ❖ **Encourage** dialogue and partnership between members and medical specialists.
- ❖ **Educate** on how to care for chronic conditions at home.

Use the EBY HouseCalls Playbook to create a HouseCalls event to engage your communities.

## HouseCalls Project Leader Checklist

- Establish topic and audience.
- Determine date and time of event.
- Inform stakeholders.
- Establish timeline.
- Enlist presenters/moderator.
- Establish commitment.
- KP Member Communication timeline
  - Marketing
  - Pre-survey
  - Post-survey
- Medical Center Communication Strategy

<u>Eight weeks before:</u>	<u>6 weeks before</u>	<u>4 weeks before</u>	<u>2 weeks before:</u>	<u>1 week before</u>	<u>2 Days before</u>	<u>Day-of</u>	<u>Day after</u>
<u>Date:</u>	<u>Date:</u>	<u>Date:</u>	<u>Date:</u>	<u>Date:</u>	<u>Date:</u>	<u>Date:</u>	<u>Date:</u>
<u>Confirm speakers and topic</u>	<u>Communication/marketing strategy</u>	<u>Finalize survey and marketing</u>	<u>Launch Marketing and outreach</u>	<u>Dry run practice</u>	<u>Dress rehearsal</u>	<u>Go live</u>	<u>Postproduction Timeline:</u>
Establish outline of message: <ul style="list-style-type: none"> <li><input type="checkbox"/> Determine topics</li> <li><input type="checkbox"/> Confirm dates</li> <li><input type="checkbox"/> Confirm speakers</li> <li><input type="checkbox"/> Create timeline for speaker, moderator and practice meeting.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Determine audience</li> <li><input type="checkbox"/> Create content for marketing and smart phrase</li> <li><input type="checkbox"/> Create inner med center distribution plan</li> <li><input type="checkbox"/> Create communication timeline</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Engage outreach team for list</li> <li><input type="checkbox"/> Create inner med center distribution plan</li> <li><input type="checkbox"/> Complete survey</li> </ul> Consult with moderator/speakers: <ul style="list-style-type: none"> <li><input type="checkbox"/> Review script</li> <li><input type="checkbox"/> Read through and time script</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Confirm Moderator and Assistant producer time the script</li> <li><input type="checkbox"/> PPT draft</li> <li><input type="checkbox"/> Confirm show flow timed draft</li> <li><input type="checkbox"/> Confirm staffing for direct booking and screening live questions</li> <li><input type="checkbox"/> Confirm final draft of script</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Reminder message goes out to identified kp.org members</li> <li><input type="checkbox"/> Producer gets target information, script, survey tracking</li> <li><input type="checkbox"/> Moderator records live answer</li> <li><input type="checkbox"/> Facilitate Debrief with follow up</li> <li><input type="checkbox"/> Create post survey</li> <li><input type="checkbox"/> Confirm roles, needed equipment</li> <li><input type="checkbox"/> Confirm Q&amp;A moderator roles</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Moderator and presenter ready to go as if day of</li> <li><input type="checkbox"/> Schedule Debrief</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Team Communication - Everyone in place 45-30 minutes prior to call for set up of equipment, last minute details</li> <li><input type="checkbox"/> Moment of- call out...and you're LIVE!!</li> <li><input type="checkbox"/> Eventbrite reminder sent 2 hours before event</li> <li><input type="checkbox"/> Send follow up email through Eventbrite with post survey</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Debrief</li> <li><input type="checkbox"/> Post survey review</li> </ul>

### Presenters/Moderator Check List:

- Presenter: Create message with 3-5 actionable points
- Moderator: Meet with presenter weekly to shape conversation and tone of discussion
- Discern what visuals need to be included during the Event.
- Attend all practices, dry run, and dress rehearsals.

### Presenters/Moderator Timeline:

**Time commitment:** 20-30 hour in six to eight-week process

<u>Eight weeks before:</u>	<u>6 weeks before</u>	<u>4 weeks before</u>	<u>3 weeks before</u>	<u>2 weeks before:</u>	<u>1 week before</u>	<u>2 Days before</u>	<u>Day-of</u>	<u>Day after</u>
Date:	Date:	Date:	Date:	Date:	Date:	Date:	Date:	Date:
Confirm speakers and topic	Draft message and title	Fine tune narrative	Finalize message and action points	Final Script show flow draft	Dry run practice	Dress rehearsal	Go live	Postproduction Timeline:
Speakers creates outline of message: What points do you want to make during event? What patient questions would you like to answer? <input type="checkbox"/> Prevention methods <input type="checkbox"/> Intervention practices <input type="checkbox"/> Myth busters unlearning bad behaviors or beliefs. <input type="checkbox"/> Tools and actionable points	<input type="checkbox"/> Meet with co-presenters and moderator - align message and expectation <input type="checkbox"/> Create narrative draft	<input type="checkbox"/> Presenters and moderator meet with assistant producer. <input type="checkbox"/> Review script <input type="checkbox"/> Read through and time script	<input type="checkbox"/> Identify points to go on slides. <input type="checkbox"/> Practice with co presenter(s) <input type="checkbox"/> Finalize survey questions	<input type="checkbox"/> Moderator and assistant producer time the script <input type="checkbox"/> Assistant producer and support staff create draft of show flow from timed script <input type="checkbox"/> PPT draft created	<input type="checkbox"/> Final draft of script	<input type="checkbox"/> Moderator and presenter ready to go as if day of. minute details	<input type="checkbox"/> Everyone in place 45-30 minutes prior to call for set up of equipment, last minute details. <input type="checkbox"/> Moment of- call out...and you're LIVE!!	<input type="checkbox"/> Debrief <input type="checkbox"/> Post survey review

### Producer Check List

- Complete timed show flow
- Finalize, edit and brand PPT deck.
- Support script development by providing feedback to Moderator and Presenter direct point of contact
- Direct communication to Teams Live producer
- Learn to be the producer in case something happens.
- Engage in script writing process to help show-flow.
- Confirm that Producer has the show flow and script.
- Send questions to moderator.

### Assistant Producer Timeline:

**Time commitment:** 20 hours in six to eight-week process

<u>Eight weeks before:</u>	<u>2 weeks before:</u>	<u>1 week before</u>	<u>2 Days before</u>	<u>Day-of</u>	<u>Day after</u>
Date:	Date:	Date:	Date:	Date:	Date:
Confirm speakers and topic	Final Script show flow draft	Dry run practice	Dress rehearsal	Go live	Postproduction Timeline:
Speakers creates outline of message: What points do you want to make during event? What patient questions would you like to answer? <input type="checkbox"/> Prevention methods <input type="checkbox"/> Intervention practices <input type="checkbox"/> Myth busters unlearning bad behaviors or beliefs. <input type="checkbox"/> Tools and actionable points	<input type="checkbox"/> Moderator and assistant producer times script <input type="checkbox"/> Assistant producer and support staff create draft of show flow from timed script. <input type="checkbox"/> PPT draft created.	<input type="checkbox"/> Final draft of script	<input type="checkbox"/> Moderator and presenter ready to go as if day of	<input type="checkbox"/> Everyone in place 45-30 minutes prior to call for set up of equipment, last minute details <input type="checkbox"/> Moment of- call out...and you're LIVE!!	<input type="checkbox"/> Debrief <input type="checkbox"/> Post survey review

# Marketing Materials

## Secured Message to Patients

Dear @NAME@,

We are delighted to invite you to the Kaiser Permanente East Bay HouseCalls event on Wednesday, November 11th, from 5:30-6:30 PM.

HouseCalls is a virtual communication tool created to **S.E.E.** our African American and Latinx members to make healthy lifestyle choices and prevent chronic disease.

- **Support** our African American members to take control of their preventive care and chronic conditions.
- **Explore** and identify opportunities to improve care.
- **Encourage** dialogue and partnership between members and medical specialists.
- **Educate** on how to care for chronic conditions at home.

[NAME, TITLE] moderates a conversation between [SPEAKER 1 and SPEAKER 2] and you, our community.

### You will get to hear about: Topic Message

This will be a FREE, virtual interactive event. We have invited our [DEMOGRAPHIC HERE] Kaiser members and their families to listen and participate in the conversation. **You do not need to be on video to join!**

Please register now for this FREE event here: [EVENTBRITE LINK]

Sincerely,

The Kaiser Permanente HouseCalls Committee

## Day of Event Check List

- Dress KP professional
- Use wired computer ONLY
- Use headset to ensure best sound quality
- Make sure the background is simple and not distracting to viewers
- Sign on 30 minutes before event goes live
- Turn off Outlook and Teams
- Mute phone

## Fliers

**HOUSECALLS**  
EAST BAY HOUSECALLS IS PROUD TO PRESENT  
**KNOW YOUR NUMBERS AND PROTECT YOUR FUTURE**  
A COLLECTIVE CONVERSATION  
**WEDNESDAY, SEPTEMBER 6, 2023**  
5:30 - 6:30 PM

Join us for a conversation with Dr. Kevin Nguyen, Palliative Care Physician, Dr. Saviour Achille, Neurohospitalist, and Dr. M. Stella Pierre, Internal Medicine Physician.

We invite you to learn about hypertension, stroke, and Life Care Planning. Discuss with us what preventive steps can be taken and what resources are available at Kaiser Permanente.

This virtual event is a FREE, interactive discussion for Kaiser Permanente members, their families, and the community to participate.

Please register now!

Register for HouseCalls by scanning the QR code or go to [www.eventbrite.com](http://www.eventbrite.com) and search for "HouseCalls"

Check the HouseCalls website for previous events.

SCAN ME

SCAN ME

Kaiser Permanente logo

**HOUSE CALLS**  
EAST BAY HOUSECALLS IS PROUD TO PRESENT  
**RECLAIMING YOUR TIME!**  
A DISCUSSION ON DIABETES MANAGEMENT  
**WEDNESDAY, APRIL 26, 2023**  
5:30 PM - 6:30 PM

Join us for a conversation between Adult & Family Medicine Physicians: Dr. Tafor Bonu (Community Medicine Specialist) and Dr. Earl Clark (HIV Specialist), moderated by Dr. Teshina Wilson (Family Medicine Specialist).

We invite you to learn about **Diabetes and Nutrition** within African American families and what resources are available at Kaiser Permanente.

This virtual event is a FREE, interactive discussion for Kaiser Permanente members, their families, and the community to participate.

Please register now. All are welcome.

Register for HouseCalls by scanning the QR code or go to [www.eventbrite.com](http://www.eventbrite.com) and search for "HouseCalls"

Check the HouseCalls website for previous events.

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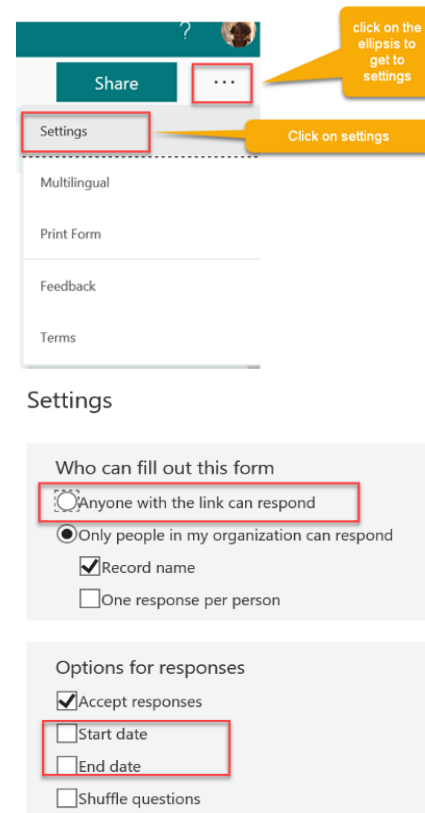
## Q&A Moderator Assignments:

- Physicians/Health Care Providers: Questions about specific diagnosis, medications, therapy, etc.
- Responds to audience intermittently with messages like:
  - "Thank you for your question. We will do our best to address it tonight".
- Producer answers technical questions and other Q&A questions
- Send questions to Primary Presenter

## Using Microsoft Forms

1. Go to settings by clicking the ellipse.

2. Create the settings necessary for people outside of KP to respond to the Pre-Survey.



HouseCalls post-survey is the next step in learning more about the target audience:

- Learn what changes patients are ready to commit to making or action they are ready to move forward on
- Determine speaker and moderator impact
- Determine how well the audience understood and found relevance in the topic
- Learn more about what patients need to close the disparity gap