

**Coordinated Care Conference (CCC)
 Facilitation Worksheet**
 (Quick reference tool for facilitating a CCC)

Date: _____

Time: _____

Location: _____

Facilitator: _____

Attendees: _____

Introductions – all participants: roles/organization	All
Purpose of the Coordinated Care Conference: The patient's goals should be articulated at the beginning of the Coordinated Care Conference so they remain the focal point throughout the meeting	Facilitator
Summarize patient's story and experiences	Patient and/or family, All
Highlight strengths, patient's efforts and progress, family supports, identify and analyze challenges (Medical and Social)	All
Explore solutions, create possibilities	All
Create a communication and follow-up strategy based upon patient's goals and needs, include next meeting date, frequency and possible triggers (such as patient request, change in goals, clinical judgement, agreed upon schedule) for additional meetings.	All
Review and summarize goals, plans, roles, and responsibilities (Ensure the Lead Care Coordinator has been clearly identified)	Facilitator, All