

Skills for Health Care Access and Navigation

OVERVIEW *and*
PREPARATION
for SESSION ONE

HEALTH LITERACY
STUDY CIRCLES⁺
HALL/NCSALL May 2005

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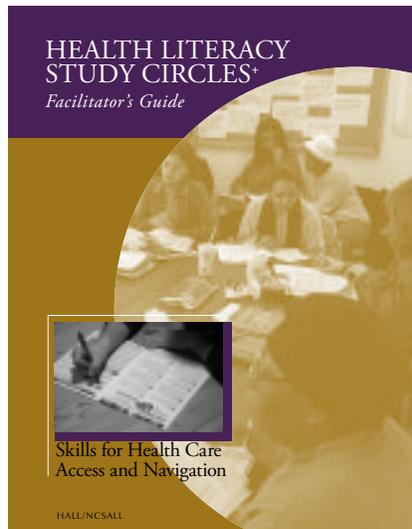
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Copies of the Health Literacy Study Circle⁺ guide, Skills for Health Care Access and Navigation can be ordered by contacting NCSALL/World Education, 44 Farnsworth Street, Boston, MA 02210, (t) 617-482-9485, (f) 617-482-0617, (E-mail) ncsall@worlded.org.

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Notes to Facilitator

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Introductory Activities

Discussion and Analysis Activities

Planning Activities

Closure Activities

Materials (loose leaf pages following the booklet)

About This Study Circle⁺ Guide

As a facilitator of this study circle, you are about to embark on an exciting and powerful professional development experience. This guide is designed to be a training manual and resource for facilitators who will conduct the Health Literacy Study Circle⁺ on the topic of Health Care Access and Navigation.

We use the word “navigation” in both a literal and figurative sense. “Navigating the health care system” means “finding one’s way” through the hallways of health centers and the departments of hospitals. It also refers to one’s ability to “obtain appropriate services.” Many adults in our society have trouble finding their way to and within health care programs and centers. They may face literacy-related barriers as they attempt to figure out and obtain needed services and coverage. Furthermore, they may be daunted by the language and assumptions of various groups of service professionals and the myriad forms and questionnaires put before them. Finally, they may feel intimidated or bewildered as they attempt to understand and advocate for their rights.

This Health Literacy Study Circle⁺ is based on five sessions. Each session is planned for approximately three hours (½ day). This notebook contains all the information you will need to conduct each of the sessions. Each session has been formatted as a bound booklet so that you can easily carry it to the session and return it to the notebook. Behind each booklet (including this one), you will find materials such as background reading, handouts for activities, and materials for work between sessions. These materials are in loose leaf format so that you will be able to make copies for each participant.

In addition, please note that this first booklet includes two variations, one for those who have participated in another Health Literacy Study Circle⁺ and one for an expanded full day session. We placed the full description of the two options here, in this booklet, so that you could make advance plans for one or both variations.

Who should use this guide?

This Health Literacy Study Circle⁺ guide has been developed to help you facilitate a learning experience for adult educators. If your state education department, community organization, or adult education program is looking for a professional development tool on the topic of health literacy, this guide provides you with a manual and a resource for training adult educators.

Who should attend the Study Circle⁺?

All of the Health Literacy Study Circles⁺ are designed for practicing adult educators who are interested in learning about health literacy and ways that they can integrate health literacy skills into their classroom teaching. We use “adult educator” to refer to practitioners working in adult basic education (ABE), General Educational Development (GED), and English for Speakers of Other Languages (ESOL) programs.

Important activities take place between study circle sessions. Participants are asked to try out activities with their students and share their teaching experiences and ideas with other participants. For this reason, it is important that participants have easy access to a classroom (ideally, their own) for the duration of the study circle sessions.

Adult educators who participate in this study circle are not asked to become health care experts. Instead, they are encouraged to use their expertise and help their students improve their reading, writing, math, and communication skills and apply these skills to health materials and tasks.

How should this guide be used?

This study circle guide was developed for facilitators. It contains notes to the facilitator, agendas, and all the printed materials and handouts you will need to facilitate each of the sessions. The guide presents this study circle on Health Care Access and Navigation in a recommended format, but the designers expect that facilitators will review the material and adjust the format and activities to suit the needs of the participating educators.

No matter how much experience you have as a facilitator or with study circles, we strongly recommend that you read this entire guide. It includes directions, all needed materials, guidelines for preparing materials, suggestions for working within the existing parameters of adult education programs, and facilitating tips for each session.

What outcomes do we anticipate from this Study Circle+?

We hope that the outcomes of the Health Care Access and Navigation Study Circle+ will be three-fold:

1. **Outcomes for adult educators:** The Study Circle+ on Health Care Access and Navigation will offer teachers a deeper understanding of health literacy, health literacy research, and health literacy skills.

The activities used in these sessions feature a range of group discussion methods that teachers might want to try out in their classes. We hope that activities such as small group discussions, use of “triggers,” and brainstorming, will expand teachers’ repertoire of co-operative learning tools.

This study circle will serve as a “jumping off point” for adult educators to help them develop ideas and activities to improve adult students’ ability to access and navigate health care systems. This study circle also provides an opportunity for teachers to form support groups and networks of colleagues so that they can continue to discuss and share their experiences teaching and evaluating health literacy activities.

2. **Outcomes for the field of adult education:** This study circle will provide opportunities to develop links between adult education and public health programs and between adult education professionals and health care providers. The health goals and objectives for the nation, delineated in *Healthy People 2010*, include the goal of improving health literacy. The health field cannot do this without the important contribution of adult education experts and a partnership with the adult education field. This study circle highlights the expertise of adult educators by focusing on critical health literacy skills.
3. **Outcomes for adult education students:** We hope that this study circle will lead to positive changes in adult learners’ abilities to interact with health care systems and professionals. The various example lessons offer opportunities for learners to acquire health literacy skills and increase their confidence in navigating health care systems. We believe that improvements in our students’ health literacy skills and in their health outcomes are the most important measures of success of all the Health Literacy Study Circles+.

We welcome your comments and advice on how to improve the Health Literacy Study Circle⁺ and we look forward to hearing about your experience using this guide. In the future, we hope to post your suggestions and examples of the work done in your groups on our Web site.

Please feel free to contact us:

A handwritten signature in black ink that reads "Rima E. Rudd". The signature is written in a cursive, flowing style.

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Organization of the Health Literacy Study Circle+ Guides

The Health Literacy Study Circles+ Guides consist of two parts. The first is a separate book titled: *Introduction: Overview, Planning, and Facilitation Tips*. The second is the *Facilitator's Guide*, prepared in notebook format, containing all the information needed for each of the three Health Literacy Study Circles+. The three Health Literacy Study Circle+ Guides in the series are: Skills for Health Care Access and Navigation, Skills for Chronic Disease Management, and Skills for Disease Prevention and Screening.

Overview, Planning, and Facilitation Tips

Introduction: Overview, Planning, and Facilitation Tips has been structured for use with all three Health Literacy Study Circles+. This book accompanies all Study Circle+ Guides, provides background information about each of the three study circles, and offers important guidelines for planning, organization, and facilitation. Please read this book first, in full.

Facilitator's Guide: Skills for Health Care Access and Navigation

This guide, in notebook format, contains six booklets. The first of the six is titled *Overview and Preparation for Session One*. This booklet offers an overview of Skills for Health Care Access and Navigation, study circle variations, details related to preparation for Session One, and materials to be sent out before Session One.*

Session Booklets

Each session booklet offers a step-by-step guide for conducting the session activities with needed time indicated. A copy of all of the materials needed for each session is provided as well. These materials, in loose leaf format,

*You will need to send out materials for Session One at least TWO WEEKS before the session begins. The flow of Session One is dependent on the reading assignment.

consist of mailings to participants, background readings, handouts in the session, and information and tools needed for work between sessions. The following bulleted list offers an overview of each session.

- **Session One: Introduction to Health Literacy**
Participants develop a shared definition of “health literacy,” discuss different types of health-related activities, and identify barriers that make it difficult for people to complete those activities. Participants also prepare to conduct a needs assessment activity with their students. After Session One, participants conduct a needs assessment with their students.
- **Session Two: Identifying Access and Navigation Tasks and Underlying Skills**
Participants review the results of the needs assessment activity and compile a list of specific health tasks and underlying skills that can be addressed with their classes. Participants also review and prepare to teach sample health literacy lessons between Sessions Two and Three.
- **Session Three: Integrating Health Literacy Skills into Instruction**
Participants evaluate the experience of teaching sample lessons and define key health literacy skills that they will focus on in their programs. They also begin to create new health literacy lessons and consider what a health literacy unit would look like. After Session Three, participants complete and teach their own health literacy lessons and develop outlines for health literacy units.
- **Session Four: Planning Lessons, Units, and Evaluations**
Participants share their teaching experience and consider health literacy units. They also consider how to define and measure their students’ health literacy skills. After Session Four, participants use a planning template to outline the design and evaluation of health literacy units.
- **Session Five: Developing Strategies for Success**
Participants share and analyze their plans and consider how they will incorporate health literacy skill development into their programs. They identify barriers, supports, and strategies for such work. Study circle participants also identify ways they can stay in contact and work together in the future.

Each session in the *Facilitator's Guide* follows the same general format and contains the following sections:

- **Notes to the Facilitator:** Offers brief descriptions and explanations of the activities and the discussion methods that will be used throughout the session. It offers a rationale for the focus and structure of the session's activities.
- **Overview:** Contains the session objectives and agenda, lists the materials you will need, and describes the preparations required for the session.
- **Introductory Activities:** Contains the objectives and agenda and sets the stage for the session.
- **Discussion & Analysis Activities:** Provides directions for helping participants define the health literacy skills related to the study circle topic.
- **Planning Activities:** Describes the activities that participants will complete in their own classrooms between sessions.
- **Closure Activities:** Provides an opportunity for participants to consider a range of discussion methods used during the session that might be useful for their own teaching. The evaluation activity offers participants an opportunity to summarize and evaluate both content and methods.
- **Materials:** Contains copies of all the readings and handouts needed for each session.

Study Circle⁺ Variations

This section describes two variations for this study circle. You will want to consider the first option IF the participants have already completed one of the other Health Literacy Study Circles⁺. You will want to consider the second option IF you and the participants agree to turn one of the half day sessions into a full day meeting.

If participants have already completed one of the Health Literacy Study Circles⁺ . . .

If participants have already completed one of the three Health Literacy Study Circles⁺, you might choose to modify Session One by skipping over a good deal of the introductory discussions focused on health literacy and the development of the study circles. You may, instead, want to include an activity using photographs of people engaged in different health-related activities to generate a discussion about barriers to navigating the health care system.

You will find a one-page description of this activity on the next page. You will find the photographs for this activity included with the “Alternate Assessment Activity” in the materials for Session One.

You can use this activity with study circle participants in the same way that participants might use it with their students to generate a discussion. You can ask participants to look at the pictures, consider the activities illustrated, and identify barriers that people may face. This activity has been very popular in workshops given at professional adult education conferences.

If you and the participants decide in advance to expand a session . . .

You could choose to expand one of the sessions to include a structured field trip to a local hospital within easy access to where the study circle meets.

This activity is designed to provide participants with an active hands-on experience of getting to a hospital and finding their way around the hospital. The purpose of the field trip is to heighten the participants’

awareness of the challenges that their students might face getting to a hospital and navigating within a hospital setting.

If you meet in the mornings, consider having a lunch break and then plan for this two-hour activity after lunch. You will find a description of the hospital field trip in the following pages.

Variation for Session One

Time: as needed

Discussion Method: Group Discussion

When participants have already completed one of the other Health Literacy Study Circles⁺ please consider this substitution.

Activity with Photographs

Consider using the photographs (found with the materials for Session One) to facilitate discussion about barriers to navigating the health care system.

Use the photographs to generate discussion of participants' experiences navigating health care.

Hang three sheets of newsprint with the following titles:

- Difficulties/Barriers
- Coping strategies
- Needed changes

Ask participants to look at the photographs and describe what is happening in each one. Pose the questions listed below to stimulate discussion:

1. *What do people find difficult about going to a hospital?
(Difficulties/Barriers)*
 - *What is difficult for you and people you know?*
 - *What might be particularly difficult for your students?*
2. *What can people do to solve some of these problems?
(Coping strategies)*
3. *What things can the hospital or clinic do to make it easier for people to get help? (Needed changes)*
4. *What can doctors do to make it easier for people to get help?
(Needed changes)*

Continue with the activities for Session One.

An Expanded Session – Field Trip to a Local Hospital (2 hours)

Overview of Field Trip Activity

This activity is designed to provide participants with an active hands-on experience getting to a hospital and finding their way in the hospital. The purpose of the field trip is to heighten the participants' awareness of the challenges that their students might face navigating a hospital setting. This field trip activity consists of four steps.

1. Travel to the hospital
2. Analysis of the hospital lobby
3. A navigation assignment
4. Discussion and analysis

For each step, you will ask the participants to think about the resources they use to navigate the hospital. A resource is any source of information the participants use to help them get to their destination, such as any use of printed materials (e.g., tools such as maps, signs, directories) or verbal interactions with people. Participants are also asked to think about “key decision points” such as taking a left instead of a right turn, checking a map, or asking someone for directions. Finally, for each step, participants are also asked to think about the activity from their students' perspective and identify the challenges that students might face in navigating a hospital.

1. Travel to the Hospital (15 minutes)

First, ask the participants to make their way, as a group, to the hospital from a designated public transportation stop.

Travel from the transportation stop (10 minutes)

As you approach the hospital, ask participants to consider where someone should enter the hospital. As you near the hospital, raise these questions:

- *Is it easy or difficult to get from the transportation stop to the hospital? Why or why not?*
- *What, if any, resources are available to help you figure out how to get from the stop to the hospital?*
- *How do you determine the main entrance of the hospital?*
- *What resources are available to help you figure out where to enter?*

- *What challenges might your students face in getting to the hospital and locating the right entrance?*

Once you have reached the main entrance, take a few minutes to discuss the groups' reactions to the questions and their observations.

Entry and Preparation (5 minutes)

At the entrance of the hospital, before the participants enter, tell the group that you would like them to enter the hospital and take some time to explore the overall “literacy environment” of the hospital lobby. This involves noting all instances of print use and any print that could potentially be used to navigate the hospital. For example, this may include signs, printed notices, pamphlets, maps, or directories. In addition, ask the group members to note additional sources of help.

Plan a meeting place near the lobby. Ask group members to meet you in 10 minutes.

2. Analysis of the Hospital Lobby (30 minutes)

Ask participants to look around the lobby to characterize the overall “literacy environment” and to identify sources of help for navigating the environment.

Look About (10 Minutes)

Ask participants to think about the following questions as they enter the hospital and explore the overall “literacy environment” of the lobby.

- *How did you feel when you entered the lobby?*
- *How would you describe the overall atmosphere? (What are people doing? How are people dressed? Did you feel welcomed?)*
- *How much is the printed word used? How is it used?*
- *What resources do you see that might help someone navigate the hospital? (e.g., signs, maps, help desk)*
- *How might your students feel here? What challenges might they face?*

Meeting and Discussion (20 minutes)

After the participants have explored the lobby, ask them to come back together to discuss their reactions to the questions and their observations.

Next, select a meeting place for a discussion. You might want to move to the hospital cafeteria. This same spot can serve as the meeting place after the small groups find their assigned location.

3. A Navigation Assignment (30 minutes)

This step in the activity focuses on actually getting from the hospital lobby to a specific designation elsewhere in the hospital, in other words, the actual process of navigating the hospital. Some people might get lost. Be sure to set a time and a meeting place (e.g., a nearby coffee shop) for the final discussion. Tell participants to return to the designated meeting place for the final discussion at the specified time, whether or not they ever reach their destination.

Group Work Assignments and Preparation (10 minutes)

Ask the group members to break into small groups of two or three. Assign each group a different destination in the hospital. Here are some options:

- Medical records
- Asthma center
- MRI or CAT Scan Testing
- Blood Donation Center or Station
- Gift shop
- Chapel
- Emergency Department Registration

Ask each group to consider the following issues as they move from the lobby to their assigned destination.

- Signs or tools
 - Placement of signs and tools
 - Words in signs
- Sources of help (help desks, interactions with people)
 - Ready access to these sources of help
 - Usefulness of the information received

Encourage participants to use any sources of help they wish.

Navigation Activity (20 minutes)

As participants carry out the small-group exercise, you may wish to accompany one of the groups so you can listen to their comments and observations.

4. Discussion and Analysis (40 minutes)

Once everyone comes together again, ask group members to share their experiences. The following questions could be used to encourage discussion:

- *How did you find your destination? What resources did you use to make your way? (Did you ask other people for directions? Did you use a map?)*
- *What did you notice about placement of signs and/or language on signs?*
- *How did you know that you reached your destination?*
- *How easy or difficult would this activity be for your students? What challenges might they face?*
- *What skills could you teach in your classroom that might help students overcome these challenges?*

Handout: Field Trip to a Local Hospital

This activity is designed to provide you with a hands-on experience getting to a hospital and finding your way about.

The purpose of the field trip is to help us become more aware of the challenges adult students face when they need to make their way to and within a hospital.

This field trip activity consists of four steps.

1. Travel from a transportation stop to the hospital

Questions to guide your observations:

- How do you know which way to go?
- How do you find the main entrance?

2. Analysis of the hospital lobby

Questions to guide your observations:

- What is the overall atmosphere?
- How is the printed word used?
- What assistance is available to help you find your way about?

3. Navigation assignment

Questions to guide your observations:

- What resources did you make use of as you tried to locate your assigned destination?
- How is the printed word used?

4. Discussion and analysis

Questions to guide your observations:

- What did you learn?
- How would your students do with this task?

Preparation for Session One

First, note the set of handouts following this booklet. These handouts should be sent to participants *in advance* of the first session meeting. Some of the readings in this packet were included to provide a context for the focus on Skills for Health Care Access and Navigation. Other readings will help prepare the participants for the overall Health Literacy Study Circle+ experience. Others will serve as the foundation for the discussions in Session One.

Next, the information below and the accompanying checklist offer detailed preparatory steps to help you get ready for Session One.

About the Welcome Letter to Participants

Before you send out these materials, you need to customize the **Welcome Letter to Participants**. This letter is designed as a template to help you create your own welcome letter for study circle participants.

Place this letter on top of all the materials.

- Be sure to include the dates, times, and location for each study circle session.
- Tell participants that they should plan to attend all sessions. If anyone anticipates problems with the scheduled dates, he or she should let you know before Session One so that you can discuss the feasibility of that person's participation. Note that attendance at all sessions is essential.

Summary Checklist

PLEASE CHECK

- Have you created your own version of the **Welcome Letter to Participants** indicating the dates, times, and location for each study circle session?

- Ask participants to bring to the first session all the materials you sent out.

Background Materials for Session One

Background materials for Session One should be sent out to participants at least **TWO WEEKS** before the session begins.

- Be sure that you have a complete set of all materials for Session One.
- Copy all of the handouts and readings on 3-hole paper.
- Send out the materials for Session One to all participants.
- **NOTE:** We do not recommend providing participants with materials for all sessions at this point – just send out the material needed for Session One.

Summary Checklist

- Do you have a complete set of background materials for Session One? (See the list of **Materials to be sent out before Session One.**)
- Did you make copies of the background materials for Session One on 3-hole paper?
- Did you place the **Welcome Letter** and the **Participant Expectations** sheet on top of the background materials you are sending out to participants?
- Did you send out the background materials for Session One to all participants at least **TWO weeks prior** to Session One?

Note about Participant Expectations

We feel that it is important to provide participants with an opportunity to convey their own expectations for this study circle. Although you may not be able to make changes to accommodate all expectations, knowing what participants expect will give you some insight into participants' thinking about the experience.

Summary Checklist

- Have you included a self-addressed envelope with the materials so participants can return the **Participant Expectations** sheets to you?

- Ask participants to complete and return the **Participant Expectations** sheet to you before Session One begins so that you can review them ahead of time.
- When you send out the materials for Session One, be sure to include a self-addressed envelope or your address so participants can complete and return the **Participant Expectations** sheets to you.
- During Session One, you will have time to review participants' expectations and note those that will be addressed during the course of the study circle.

Facilitator Preparation

It is important for you to review the study circle guide and all the handouts for each session well in advance. You will need to prepare all the materials for each session and for follow-up assignments (copy handouts and prepare newsprints).

For Session One, we recommend that you make a few extra copies of background materials in case participants have misplaced those they received prior to the start of the study circle.

Each handout and reading included in this guide is a stand-alone document and can either be photocopied or downloaded from the NCSALL Web site at www.ncsall.net and the HALL Web site at www.hsph.harvard.edu/healthliteracy

Summary Checklist

- Have you read all the Session One background materials that you sent out to the participants?
- Have you read all of the Session One materials?

Notes



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