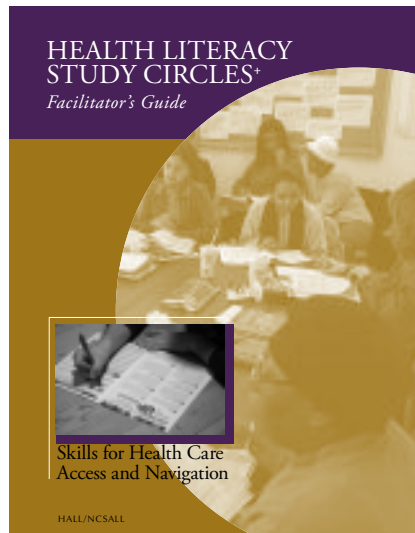


Skills for Health Care Access and Navigation

SESSION ONE: Introduction to Health Literacy

**HEALTH LITERACY
STUDY CIRCLES⁺
HALL/NCSALL May 2005**

Skills for Health Care Access and Navigation



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HEALTH LITERACY STUDY CIRCLES+
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Notes to Facilitator

Each session in this guide begins with notes to you, the facilitator. As we wrote these notes, we tried to imagine a face-to-face conversation with you in preparation for each session. We have tried to anticipate your questions and provide you with a sense of the flow of the session activities.

Every Study Circle⁺ session has four parts: Introductory Activities, Discussion and Analysis Activities, Planning Activities, and Closure Activities. Each of these parts is designed to engage participants in discussions and activities related to health literacy.

The following information will give you a brief description of the session's activities and the different methods you will use to facilitate group discussions.

About This Session

Session One is critical. The activities of the session are intended to introduce “health literacy” and help you establish a welcoming atmosphere that encourages reflection, discussion, and action. This session includes a range of activities designed to engage the group and encourage participation. This session will establish an important backdrop for subsequent sessions.

Introductory Activities

The Introductory Activities of Session One are designed to help participants understand the purpose, structure, and content of the Health Literacy Study Circles⁺. The Introductory Activities provide an opportunity for you to clarify expectations by acknowledging the questions and concerns that the participants expressed in their Participant Expectation Sheets.

Discussion and Analysis Activities

The Discussion and Analysis Activities of Session One focus on the larger context of health literacy and help participants clarify their own definition of health literacy.

- The first activity uses the background readings as the basis for discussion.
- The DVD, *In Plain Language*, features adult learners from an adult education program and illustrates a variety of health literacy issues. It will “trigger” discussion about health literacy, access, and navigation. The DVD is in the front pocket of the notebook.
- After a short break, participants will reflect on their own experiences as they navigated health systems for themselves or loved ones. As they move from small group discussions to the full group discussion, they will identify a range of system demands and barriers that they or those they love have faced.

Planning Activities

The Planning Activities of Session One are designed to give participants an opportunity to review the work they will do in their own classes between Session One and Session Two. These activities will prepare participants to conduct a needs assessment of their own students’ health literacy skills and the difficulties their students encounter in navigating the health care system. In addition, you will ask participants to establish partnerships to help them complete the assignment between sessions.

The needs assessment materials include a short story about one woman’s struggle to navigate the health care system. You will want to point out to participants that the story, entitled “A Simple Test,” should serve as a “trigger” for discussion in the classroom just as the video served as a trigger for discussion in the study circle. The participants will use “A Simple Test” with their students to prompt discussion about their own navigation experiences.

During Session Two, participants will be asked to discuss their classroom work and reflect on both the process of using the needs assessment materials, as well as their students’ responses about their navigation experiences.

Closure Activities

At the end of Session One and all other sessions, you will facilitate the Closure Activities. This is a time for you to summarize the session and review the methods you used to present information and to facilitate discussion.

Closure Activities include the following activities:

- The “Content Review” is used to reinforce and clarify the concepts discussed during Session One.
- The “Methods Review” is designed to help participants identify group discussion methods that they might want to try out with their students.

Finally, a few minutes are allocated for participants to complete and return their session evaluation forms. After the session, review these forms and make use of the feedback as you see fit.

The Group Discussion Methods

Throughout this Study Circle⁺ you will use a variety of discussion methods to present information and facilitate activities. We hope that participants will find these methods helpful and consider using them in their own classrooms. Therefore we ask you to keep in mind that as you facilitate the Study Circle⁺ activities, you will be modeling these discussion methods for participants to use in the future.

We have given names to these discussion methods in order to highlight the variety of methods used in different activities. These names are also helpful during the summary and evaluation activities at the end of each session.

The discussion methods used in Session One include:

- ***Presentation:*** Although you should try to avoid a lecture-like approach, there are times when a presentation from you is very important. You will open the session with a presentation on the goals and objectives of the study circle.
- ***Triads (groups of three):*** The triads enable people to work together in very small groups to share reflections on the readings in a format that ensures participation.
- ***Expanding Discussion (small group to large group work):*** You can use an expanding discussion to encourage comfortable interaction

by participants who may not know one another. This discussion expands by the size of the group (from two to four to whole group) and by the type of content (from personal to more general topics).

The expanding discussion generally begins with small groups of two people who introduce themselves and share an experience. This offers a comfortable starting point for people who are not at ease speaking in a large group. Next, two pairs come together to share findings and discuss similarities. The group of four addresses issues that move beyond their personal experiences. This group then prepares a summary of their discussion to present to the larger group.

When all of the smaller groups come together, they present their summaries to each other. This enables the entire group to share the same knowledge base and prepares them for a facilitated discussion with a focus on broader issues.

Depending on the size and layout of the room, the small group summaries can be presented orally or posted on newsprints so the participants can briefly walk about and see the notes from all groups.

- **Brainstorm:** A brainstorm activity stimulates a group to generate ideas or solutions. As the facilitator, you want to help people feel comfortable stating ideas without inhibition and without feeling judged. Therefore, during a brainstorm, you will ask participants *not* to comment on or evaluate the suggested ideas. All ideas are just listed on the board or on newsprint as they are suggested.

Once the group has listed as many ideas as possible, participants can analyze the list in different ways. For example, they might group similar ideas together under different categories. They can then review the lists and order items in terms of importance, suitability, or difficulty.

During a brainstorm activity, participants are encouraged to generate many ideas and to consider all ideas. Participants should not link specific ideas to the people who suggested them and should not feel that they need to defend any of their own ideas.

- ***A Trigger:*** A trigger may be a film, a story, or a brief presentation. It is so named because it “triggers” discussion. In addition, the use of a trigger enables all participants to have the same starting point for discussion. For example, in this session a video/DVD provides an effective orientation to health literacy issues and is used to trigger discussion about health literacy and navigation. A brief introduction lets viewers know what to look for.
- ***The Dance and the Balcony:*** This activity is a metaphor for analyzing the group discussion methods used during the session. The purpose of this activity is to highlight the different ways you have structured activities and encourage teachers to consider using some of these methods in their own classes.

Participants are asked to think of the activities they just completed as a “dance.” This review activity asks that they stop the dance and move up to the balcony to look down on the dance floor. They stop “dancing” and view the dance from a distance. From the “balcony” participants analyze the dance. They comment on and evaluate the discussion methods. Note that you will be conducting this activity at the end of each session.

**First meetings can be both daunting and exciting.
Be prepared, share your enthusiasm, and enjoy!**

Overview: Session One

Objectives

One of the principal goals for this study circle is to prepare participants to help their students develop basic skills to better access and navigate the health care system.

During Session One, the participants will:

- Develop a shared definition of “health literacy”
- Identify different types of navigation activities
- List literacy-related barriers to successful access of and navigation in health care systems

Time

- 3 hours

Session One Agenda

The time suggested for activities is based on a three-hour session. You can expand any activity if you have more time.

Introductory Activities (40 minutes)

- Welcome and Introductions
- Review Study Circle+ Goals, Objectives, and Agenda
- Overview of the Health Literacy Study Circles+

Discussion & Analysis Activities (1 hour, 30 minutes)

- Reflect on Health Literacy Readings
- – 10-minute break –
- View and Discuss *In Plain Language* (Video or DVD)
- Reflection and Discussion of Our Own Experiences

Planning Activities (30 minutes)

- Prepare for the In-Class Needs Assessment Activity (“A Simple Test”)

Closure Activities (20 minutes)

- Session Review and Evaluation

Materials and Preparation

- DVD: *In Plain Language*
- DVD player
- Newsprint (flip charts) and Markers
- Overhead projector

Newsprints (flip charts) or overhead transparencies (4)

The following pages should be prepared on newsprint (flip charts) or copied on overhead transparencies. In the session notes we typically refer to these materials as “newsprints,” but feel free to use overhead transparencies instead. Examples of newsprints are included within the session notes.

To be prepared ahead	To be completed during the session
<ul style="list-style-type: none"> ■ Study Circle⁺ Graphic ■ Discussion Questions for <i>In Plain Language</i> 	<ul style="list-style-type: none"> ■ Why Health Literacy Is Important for ABE/ESOL Students ■ Our Challenges and Barriers in Health Care Access and Navigation

Handouts (7)

Make copies of the handouts before the session begins. Note that handouts are located in the “Materials” section for Session One.

1. Participant Contact List (ask participants to fill in the information and then copy and distribute the list to everyone)
2. Shared Goals but Different Roles in Health Literacy
3. Session One Objectives and Agenda
4. The In-Class Needs Assessment Packet includes the following materials:
 - Identifying Student Barriers to Health Care Access and Navigation
 - After Conducting the Needs Assessment
 - “A Simple Test”
 - Lesson Companion to “A Simple Test”
 - “A Simple Test” – Questions to think about
 - Alternate Assessment Activity with Photographs
5. Session One Evaluation Form

Sent out before Session One

6. Skills for Health Care Access and Navigation: Goals and Objectives
7. Participants’ Definitions of Health Literacy

Session One: Introduction to Health Literacy



Photo © Jon Crispin

INTRODUCTORY ACTIVITIES (40 minutes total)**Welcome and Introductions** (15 minutes)**Discussion Method:** Presentation by facilitator**Handout:** Participant Contact List*Welcome*

Welcome participants to the first meeting of the Health Literacy Study Circle⁺ on Health Care Access and Navigation. Introduce yourself and state your role as facilitator. Explain how you came to facilitate this Study Circle⁺ and who is sponsoring it.

Introductions

Ask participants to introduce themselves briefly by giving their name, role, and program. Also ask them to indicate briefly ($\frac{1}{2}$ minute) whether or not they have had any experience teaching health topics or health-related skills in their ABE/ESOL classrooms.

This is a good time to hand out the Participant Contact List (if you had time to assemble one) or pass around the list and ask people to fill in their information. Explain that you will ask participants to keep in touch between sessions for different assignments.

Comment on Participants' Expectations

- Comment on the responses to the Participant Expectations handouts that were returned to you by participants. (If you did not receive any of the completed forms ahead of time, invite participants to briefly share their expectations now.)
- Identify those expectations that will be covered and indicate the points in the study circle when those things will happen.

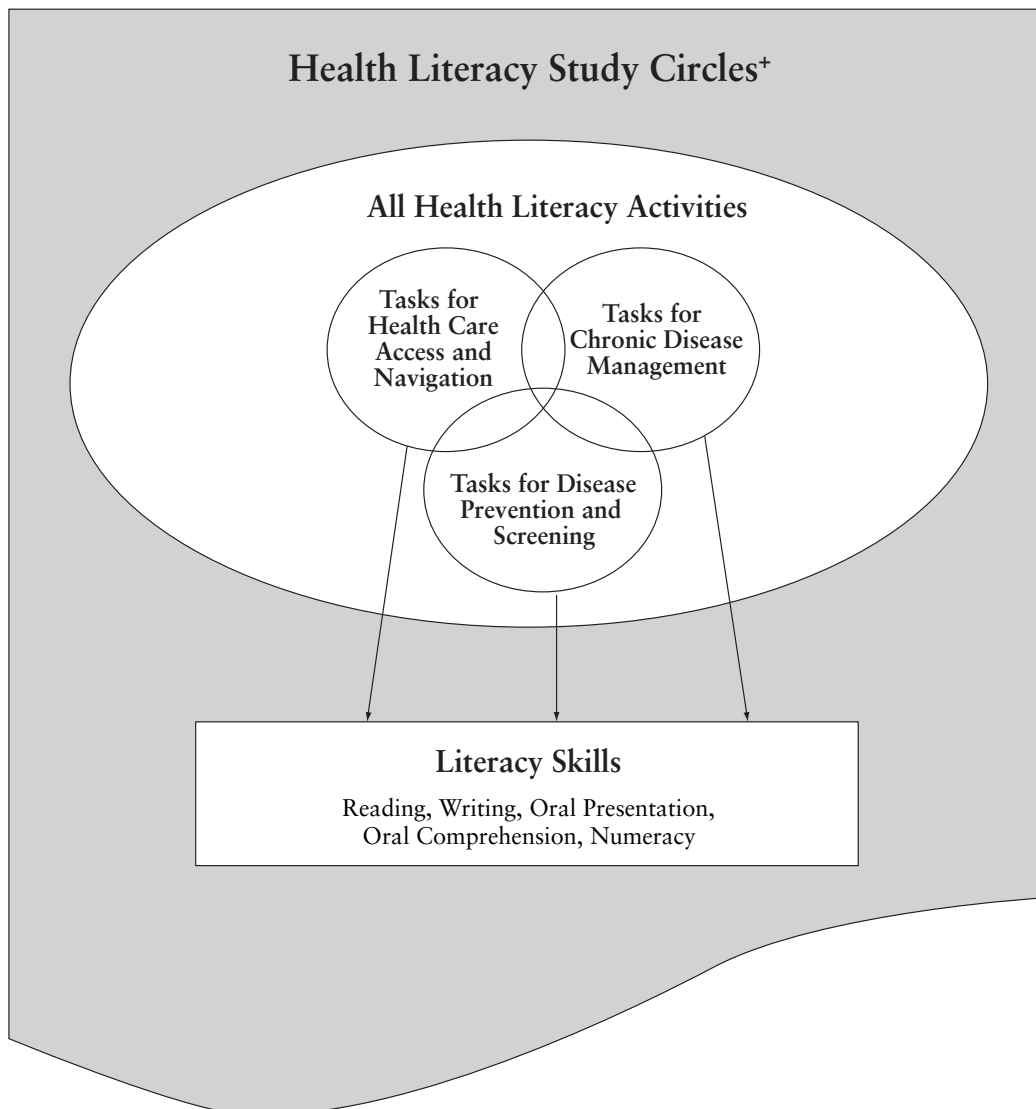
Overview of the Health Literacy Study Circles⁺ (10 minutes)

Discussion Method: Presentation by facilitator

Handout: Shared Goals but Different Roles in Health Literacy

Display the Study Circle Graphic on newsprint or on an overhead

- Take a few minutes to explain the rationale behind the development of the Health Literacy Study Circles⁺.
- Explain to participants that this graphic represents an overview of the Health Literacy Study Circles⁺.
- Briefly describe the parts of this graphic.



- **All Health Literacy Activities:** Point out that the larger oval represents a broad array of health literacy activities that take place at home, at work, in the community, and in health care settings. These activities include tasks and skills related to health promotion, health protection, disease prevention, care and maintenance, and health care systems navigation.
- **The Health Literacy Study Circles⁺** (represented by three smaller circles) cover three areas of critical importance documented in health research:
 1. **Tasks for Health Care Access and Navigation** (with a focus on access to care): Poor people have limited access to health care and minority population groups are more likely to face bias when trying to “navigate” through the health care system.
 2. **Tasks for Chronic Disease Management:** People without a high school diploma are more likely to die from chronic diseases than those with more education.
 3. **Tasks for Disease Prevention and Screening** (with a focus on early detection): Poor people and those from minority groups are less likely to use preventative services and screening programs.

Note that the Health Literacy Study Circles⁺ could have addressed many different groups of health activities and considered a variety of health literacy skills in this series. These three areas were chosen because they have been highlighted as areas of the greatest health disparities in the U.S. Improvement in each of these areas can help reduce existing disparities and improve the health of those who are poor, those without a high school diploma or GED, and those who are from minority populations.

- **Literacy Skills:** Call attention to the literacy skills – reading, writing, oral presentation, oral comprehension, and numeracy. These kinds of skills will be the focus of participants’ work in this and all Health Literacy Study Circles⁺.
- **Adult Educators’ Contributions:** Point out that, to fully address needed improvements in the areas of navigation, chronic disease management, and prevention requires an effort on the part of both health professionals and educators. The Health Literacy Study Circles⁺ are aimed at enabling adult educators to make their contribution to this overall endeavor by focusing on skills that fall within the realm of ABE and ESOL and can be transferred to the three critical health areas.

Discuss the role of the adult educator in health literacy activities

- Distribute the handout titled Shared Goals but Different Roles in Health Literacy
- Review the handout with participants
- Ask for someone to summarize the role of the adult educator
- Ask for comments or questions

Review Study Circle⁺ Goals, Objectives, and Agenda (15 minutes)

Discussion Method: Presentation by facilitator

Handouts: Skills for Health Care Access and Navigation:

Goals and Objectives
Session One Objectives and Agenda

Briefly review the Goals and Objectives for this Study Circle⁺

- Ask participants to look at the handout titled Skills for Health Care Access and Navigation: Goals and Objectives that they received with other materials before Session One as you briefly review it.
- Explain that the Health Literacy Study Circles⁺ differ from traditional study circles because they go beyond discussion to include more practical components. Note that the activities in the Health Literacy Study Circles⁺ are designed to support participants as they explore and develop materials that suit their teaching styles and their students' needs.
- During this study circle, participants will explore their students' needs and interests in relation to health care access and navigation, try out sample lessons, and reflect on this experience with peers. Participants will also develop their own lessons, units, and plans for implementing health literacy activities into their programs.
- Ask if anyone has any comments or questions.

Distribute the Session One Objectives and Agenda

- Review the Objectives and Agenda for Session One.

DISCUSSION & ANALYSIS ACTIVITIES

(1 hour, 30 minutes total including a 10-minute break)

Reflect on Health Literacy Readings (30 minutes)

Discussion Methods: Triads, small groups for initial discussion

Explain that this activity begins with an analysis of the readings in small group discussions. Let the participants know that you are forming small groups to give everyone an opportunity to share their thoughts and insights. Each group will take about 10 minutes to address two questions. Ask for a volunteer in each group to be prepared to report back to the larger group.

Ask participants to form triads – small discussion groups of three (10 minutes)

Each group member should offer a brief introduction, perhaps sharing where and what he or she teaches. Members should share reactions to the readings sent to them and focus on the following two questions:

1. *What, if any, new insights did the readings offer?*
2. *How did the readings change or support your own definition of health literacy?*

Note that participants may want to refer to their Participant Definition of Health Literacy handouts that were included in the background reading packet sent out before Session One.

Groups report back (10 minutes)

Ask a spokesperson from each group to report back to the whole group and share comments on readings and views of health literacy. Any definitions of health literacy that groups care to share can be posted.

Summarize

- You might want to provide a brief summary of the groups' comments after all groups have reported. For example, you might point out that most groups seemed to find new information in "Reading X." Let participants know that many different definitions of health literacy have been suggested in the health field.
- Note too that the Institute of Medicine report on health literacy highlights the fact that health literacy depends on the literacy skills of individuals and on the demands of institutions. It is a shared responsibility.

Facilitate discussion (10 minutes)

Ask the full group of participants to consider the arguments posed in the background readings that support a focus on health literacy in adult education. Pose the following questions:

1. *People in the health field would tend to identify those adults in your classes as members of “at risk” population groups. Do you agree? Are they more “vulnerable” in regard to health than are others in our society?*
2. *What are the health risks people with limited literacy face?*

TAKE A 10-MINUTE BREAK

View and Discuss *In Plain Language* – DVD

(20 minutes)

Discussion Method: Use a DVD as a trigger for a large group discussion

Note to Facilitator: The DVD is in the front pocket of the notebook.

Introduce and play the DVD In Plain Language (20 minutes)

- Note that the DVD serves as a vehicle to set the stage for an expanded discussion of health and literacy. The DVD deals with the topic of health literacy from several perspectives.
- Before you view the DVD, post the following questions on a newsprint to guide participants’ viewing.

Discussion Questions for *In Plain Language*

1. What are some of the literacy-related challenges people face in everyday life?
2. What are some of the challenges related to access to care?

Note to Facilitator: The participants in this group may have already taken part in another Health Literacy Study Circle⁺. If this is the case, please substitute the alternative activity described on page 10 of the *Overview and Preparation for Session One* booklet.

Facilitate a very brief whole group discussion

After viewing the video write the following title on newsprint: Why Health Literacy Is Important for ABE/ESOL Students. Pose the following question for discussion and record responses on newsprint:

If a colleague in your program asked, why would you say that health literacy is important for ABE/ESOL students?

Why Health Literacy is Important for ABE/ESOL Students

Reflection and Discussion of Our Own Experiences (30 minutes)

Discussion Methods: An expanding discussion and brainstorm activity

Explain that in this next activity, participants will explore their own experiences with health care systems.

Introduce the Expanding Discussion Method (10 minutes)

The Expanding Discussion activity begins with a 5-minute discussion in pairs, moves to a four-person discussion as two pairs come together (another 5 minutes), and then moves to the larger group. Be sure to offer a 1-minute warning before asking participants to move to the next step.

Participants work in pairs (5 minutes)

Ask participants to assemble in pairs and to choose someone they've not yet worked with. Ask each person to think about an experience of their own when they tried to navigate some aspect of the health care system or when they helped a parent or loved one do so.

- Ask each pair to share a story (allow about 2 minutes for each story).
- After 2 minutes, remind participants to let the second person talk.

Participants work in small groups of four (5 minutes)

- Ask each group of two to join with another to form groups of four.
- Ask each group of four to name and record the navigation issue they shared (for example: filling out forms, finding a location, choosing a benefit package).
- After just a few minutes, ask each group of four to name some barriers and challenges they faced (for example: making sense of the jargon in a benefit package).

Reassemble the full group for a discussion (10 minutes)

- Post newsprint titled *Our Challenges and Barriers in Health Care Access and Navigation* so that one member can record the contributions of the different groups.
- Ask each group of four to report briefly to the whole group.

Our Challenges and Barriers in Health Care Access and Navigation

Tasks

Challenges and Barriers Faced

- Ask the participants to review the posted list and then brainstorm additions (call out ideas but do not comment on those posted).
- Pose the following questions to the whole group for discussion:
 1. *What other access and navigation tasks could you add to this list?*
 2. *What other challenges and barriers could you add?*

If no one recalls more than one or two tasks, draw examples from this list:

- Find services
 - Obtain health insurance coverage and benefits
 - Fill out forms for insurance, Medicare, Medicaid, etc.
 - Choose from options in benefit packages or health care plans
 - Talk to bureaucrats
 - Get an answer by phone
 - Keep and organize your own records
- Note that this Study Circle⁺ addresses many of these issues.

Introduce the next activity

Note that as participants prepare to work with their students on health care access and navigation issues, they will first need to gain some insight into the interests and challenges experienced by their students. Point out that, in the next part of this session, you will review an activity that facilitates that process.

PLANNING ACTIVITIES (30 minutes total)

Prepare for the In-Class Needs Assessment Activity (“A Simple Test”) (30 minutes)

Discussion Methods: Full group discussion with a presentation, individual reviews, and group analysis

Handout: In-Class Needs Assessment Packet

This work will prepare participants to conduct a needs assessment in their classrooms between Sessions One and Two.

Introduce the assignment

- Explain that participants are being asked to try out an activity in their classrooms before the next session.
- Note that this class activity will serve as a needs assessment.
- Explain that this activity is designed to help them learn more about their students’ abilities to access and navigate health care systems.

Distribute the In-Class Needs Assessment Packet

- Briefly review page 1 of the handout titled Identifying Student Barriers in Navigation
- Explain that you would like participants to use this activity in their classrooms to learn more about their students’ experiences with the health care system and to identify the challenges and barriers their students encounter.

Ask participants to take a few minutes to read the story, “A Simple Test.”

- Tell participants that they can use this story in their classes as a discussion trigger in the same way that the video was used earlier in this session.
- After participants have read the story, pose the following questions:
 1. *Is this story suited to your students’ reading level?*
 2. *If needed, will you be able to adapt this story for your class?*
 3. *How might you modify the story for your class?*

Review the key elements of the lesson in the Lesson Companion to “A Simple Test”

- Pose the following questions to the group:
 1. *Is this activity suited to your students’ reading level, oral language level, or level of comfort?*
 2. *Where might your students have trouble?*
 3. *If needed, how might you modify the lesson for your class?*
 4. *Are there any barriers that would prevent you from trying out this lesson with your students?*

Problem solve

- If a number of participants anticipate difficulties trying out this lesson in class, ask group members to offer suggestions for other ways to conduct the needs assessment on this topic.
- If some participants feel that the story and lesson will be too difficult for their students, suggest that they use the Alternate Assessment Activity with Photographs.

Review the questions on the handout titled Identifying Student Barriers to Health Care Access and Navigation

- Explain to the participants that they should summarize their discussion with students by answering the questions on page 2 of the handout.
- Also ask them to be prepared to share their findings and reflect on this assessment activity during Session Two.

Ask participants to find a partner for this assignment

- Ask participants to find a partner for this assignment (perhaps someone they worked with in an earlier activity).
- Ask the pairs to exchange names and phone numbers so that they can speak with each other before and after completing the needs assessment with their students.
- Encourage them to:
 - Discuss the assignment and any problems they anticipate
 - Discuss how the assessment went
 - Share their findings and observations

CLOSURE ACTIVITIES (20 minutes total)

Session Review and Evaluation (20 minutes)

Discussion Methods: Facilitated full group discussion, The Dance and the Balcony

Handout: Session One Evaluation Form

Content Review (10 minutes)

You may want to ask if anyone in the group is willing to summarize key content areas or make a statement about insights or new information. You or the volunteer will likely highlight the following:

- Definitions of “health literacy.”
- Issues and challenges they have faced as they try to gain access to and navigate within health care systems.
- Assessment activity to identify issues and challenges their students face.

Methods Review – The Dance and the Balcony (10 minutes)

Introduce The Dance and the Balcony metaphor.

- Explain that you would like the group to take a little time to reflect on the discussion methods – the way in which activities were structured during this session.
- Imagine that we have been dancing on a large open dance floor with a balcony above it. It is time to stop “dancing” and move from the dance floor to the balcony to look down and comment on our dancing.
- Then ask participants to identify the discussion methods that they feel would be effective in their own classrooms. Use the table below to help you facilitate this discussion.

- Describe some of the discussion methods used during this session and invite participants to identify the methods that they feel would be effective in their own classrooms. Use the table below to help you facilitate this discussion.

Session One Discussion Methods	Activity Examples
Triads (groups of three people)	Reflect on background readings and on definitions of health literacy
Discussion Trigger	<i>In Plain Language</i> DVD
Facilitated Large Group Discussion	Discuss why health literacy is important for ABE/ESOL students
Expanding Discussion (two people, then four, then larger group)	Identify our own challenges and barriers with health care access and navigation
Review, Analysis, and Group Discussion	Prepare to conduct the in-class needs assessment (“A Simple Test” and the lesson plan)
The Dance and the Balcony	Reflect on the study circle discussion methods and structured activities

Session Evaluation

- Distribute the Session One Evaluation Forms and ask participants to complete them.
- Collect the evaluation forms before the participants leave.

Closing Notes

- Thank the participants for their contributions during this session.
- Address any logistical issues related to Session Two.
- Post the date, time, and place for Session Two.

Notes



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