Health Literacy Series

Starting Up and Advancing Your Company’s Health Literacy Program

Presented to:
America’s Health Insurance Plans
February 26, 2009

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Presentation Goals

- Overview of health literacy as a policy issue
- How Affinity is creating a health literacy culture
- How addressing health literacy improves our ability to better assist our members through clear communication
About Affinity

- Independent, not-for-profit managed care plan
- Mission-driven: to improve the health of underserved populations...by improving care-seeking and care-giving
- 220,000 Members in 10-county metro-NYC area
- Medicaid, Family Health Plus, Child Health Plus, Medicare Special Needs Plans for Dual Eligibles
- Our Members...New York in all its cultural, ethnic and racial diversity
How we got started

- Determined that health literacy is part of our mission-driven *corporate strategy, not a project*

- Prepared a paper on the “business case” - adults with Medicare, Medicaid or no insurance are more likely to have basic or below basic health literacy

- Formed a “Guiding Coalition”: right people, trust, common goal

- Assessed fit with Customer Service strategy and philosophy

- Executive team endorsement -- Chief Medical Officer and VP of Public Affairs sponsorship

- It’s about the written and spoken word *and* cultural competence.....clear health communication
## Guiding Coalition Members

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<tr>
<th>Name</th>
<th>Title</th>
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<tr>
<td>A. Abboa Offei</td>
<td>Vice President</td>
<td>Customer Service/Public Affairs</td>
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<td>A. Van Etten</td>
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<td>B. Hurley</td>
<td>Director</td>
<td>Quality Management</td>
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<td>C. Blanco</td>
<td>Community Liaison</td>
<td>Marketing</td>
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<td>C. Cocotas</td>
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<td>C. Ramirez</td>
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<td>D. Rogers</td>
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<td>Provider Relations, Contract, Credential</td>
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<td>I. Wikler</td>
<td>Program Manager</td>
<td>Office of CMO</td>
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<td>J. Leuchter</td>
<td>Program Manager</td>
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<td>J. Frederic</td>
<td>Coordinator</td>
<td>Quality Management</td>
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<td>J. Maddox</td>
<td>Manager, Training &amp; Quality</td>
<td>Customer Service</td>
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<td>K. Romero</td>
<td>Sr. Manager</td>
<td>Medical Management</td>
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<td>L. Hernandez</td>
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<td>L. Solomon</td>
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First Tasks

- Did some shared reading
- Evaluated “touch points”—everyone needed to see the whole picture
- Developed Vision, Goals and Objectives
- Completed an organizational baseline assessment
User Profile:
• Single Female, Age 28
• Mother of 2
• Son, Age 9: Asthma 3
• Daughter, Age 6: Asthma 1

Non-User Profile:
• Single Male, Age 35
• Obese/Smoker

Initial Touchpoints to Affinity:
Doctor, Ad, Friend, Member, LDSS, Marketing Rep, Community Event, CSC, Affinity Employee

Asthma Case Management

Various different episodes/encounters where Affinity touches Members; Doesn’t include touches by our providers and vendors!

8 months

11 months
**Asthma Case Management**

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**Goal**

Navigate the healthcare system

**Task**

Fill out Application

**Example of Skills**

- Read, write and follow instructions to complete application.
- Comprehend questions asked, patient rights, responsibilities, etc.
- Organization skills to identify and provide correct documents.

**Excerpt from IOM: Health Literacy – A Prescription to End Confusion – April 2004**

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**Member fills out application**

**Member calls Cust. Svc; CS makes PCP appt.**

**Member receives HRA**

**Member receives HRA for asthma program**

**Member reads asthma related materials**

**Member speaks to Case Manager**

**Member meets with RT in home**

**Member has PCP appointment**

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**Recertification**

**8 months**

**Member receives phone call and letter from Recert**

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**8 months**

**11 months**

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**11 months**
Guiding Coalition Vision

Vision Statement

- To create a health literate environment empowering Affinity members to achieve their full health potential

Coalition Goals

- To improve Members’ confidence and ability to act on health information effectively and thus manage their conditions (health) with positive outcomes

- To improve Members’ ability to access health care services and successfully navigate the system
Objectives

- Coordinate efforts throughout Affinity to positively impact care seeking and care-giving

- Embed and activate the principles of health literacy and plain language in every Affinity encounter to improve customer service

- Establish Affinity as a leader and model for health literacy and health education

- Inspire Providers to identify patients with low health literacy skills to ensure patients understand and act upon the health information provided

- Enhance Providers’ capacity to effect positive behavior change through improved communication with patients and thus improve clinical outcomes

- Support the community’s resources, capacities and abilities to effect positive behavior change at the community level
Baseline Assessment to Begin Affinity’s Health Literacy Transformation

- Conducted a needs assessment among staff across all operational departments:
  - Adapted a literacy audit tool -- *Literacy Alberta Audit Kit* (S. Devens, A. Scott) -- to frame the questions according to our organization’s business and goals

  - Four areas of concern: Clear Communication, Sensitivity to Literacy, Promotion and Publicity, Print Materials
Health Literacy Assessment Tool*
Clear Communications: Findings

Sample questions:
1. We avoid jargon when we communicate with Members.
2. We continually check that our Members understand the information we give them.

*RATINGScale

1= This is something we are not doing presently, but should consider.

2= We are doing this, but can make some improvements.

3= We are satisfied that we are doing this well.

4= Not Applicable to our program and/or department

*Adapted from Literacy Alberta Audit Kit (S. Devens, A. Scott) Alberta Association for Adult Literacy 2003
Health Literacy Assessment Tool*
Print Materials: Findings

Sample questions:
1. We regularly review our printed materials to check how easy they are to read.
2. Affinity develops and periodically review literacy guidelines for printed materials.

*Adapted from Literacy Alberta Audit Kit (S. Devens, A. Scott) Alberta Association for Adult Literacy 2003
Observations from Needs Assessment

- Many staff “think” we are doing a great job communicating
- We don’t measure whether our efforts are producing the desired outcomes for our Members
- Staff unclear about how “health literacy” relates to what they do
- But the message resonated and created excitement; a lot of “AHA” moments
- Everyone recognized their role in communication
Baseline Assessment Opportunities

- **MEMBER**
  - Offer health literacy and clear communications training for Affinity staff.
  - Provide creative ways to assist Members in navigating Affinity’s health care system.
  - Provide creative communication strategies to touch all Members including those with low literacy skills.
  - Develop and institute literacy Policies and Procedures

- **PROVIDER**
  - Offer low literacy and clear communications training for Affinity healthcare Providers

- **COMMUNITY**
  - Identify community adult literacy resources and develop a resource directory for Staff.
  - Use creative communication strategies to touch Members and promote Affinity Health Plan
Recommendations

➢ “Fix ourselves before we try to fix others.......”

- Train staff to better assist our members
- Enhance our written materials
Training Approach

- All new hires complete a one-hour session during Orientation to introduce topic
- RFP to develop more rigorous skills-based training---We need help!
- Contract awarded to Literacy Assistance Center of New York to build train-the-trainer program
Status of Training Initiative

- Completed organizational needs assessment
  - 1:1 interviews with all categories of staff who interact with Members via phone, face to face, or written communication
  - Reviewed recordings of Customer Service and Medical Management phone calls
- Finalized learning objectives, evaluation plan, and basic curriculum
- Development of advanced curriculum is underway
- Train-the-trainer and rollout will begin in Second Quarter 2009
Basic Curriculum Modules

- Introduction to Health Literacy
  - definitions of literacy and health literacy
- How Low Health Literacy Affects Affinity’s Members
  - learn to identify some of the signs of low health literacy
- Health Literacy at Affinity
  - Affinity’s goal to improve care giving and care seeking
  - incorporate personal values with corporate value
- Elements of Plain Language
  - address low health literacy by using plain language techniques
  - practice the Teach Back
Advanced Curriculum: Phone Skills Module*

- **Principles of Oral Communication**
  - basic principles of effective oral communication
  - self-assessment of their strengths and weaknesses
- **How to Aid Understanding**
  - organize and communicate information on the phone that make it easier for Members to understand and follow instructions
- **Effective Listening**
  - techniques for improving communication
  - listening carefully to Member concerns and feedback
- **Plain Language and Teach Back**
  - solidify understanding of plain language techniques and the Teach Back Method of verifying Member understanding
  - learn skills specific to phone communication

*draft
Enhance Written Materials

- Implement Health Literacy Advisor Software
- Train those who outreach with Members across departments and functions
- Review and amend all “old letters”
  - Heavily regulated environment
  - Clinical content must be re-examined
- Create new letters that meet clear communication standards; health literacy policy and procedure
Major Obstacles and Lessons Learned

- Breaking down “silos”
- Understanding how it impacts “me”
- Regulatory environment; State and Federal
- Measuring impact
- Resources--$360,000 spent over 2 years thus far with results pending
- Only persistence, a sound rationale and working it at all levels of the organization will overcome challenges
- Everything takes longer than you think!
Presentation Summary

- Organizational culture is key
- By improving our communication skills we can make a difference for our members; improved health, better outcomes and lower costs!
Thank you