

# The Health Literacy Environment Activity Packet

## First Impressions & Walking Interview

Eliminating Barriers – Increasing Access

Rima E. Rudd  
Health Literacy Studies

On-Line Resources  
[www.hsph.harvard.edu/healthliteracy](http://www.hsph.harvard.edu/healthliteracy)

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This packet draws from  
*The Health Literacy Environment of Hospitals and Health Centers: Making your Healthcare Facility Literacy Friendly*  
by Rima E. Rudd and Jennie E. Anderson

The following individuals contributed to the recent revisions:

**Debra Keller, M.D.**

University of California, San Francisco

**Marie McCormick, M.D., Sc.D.]**

Harvard School of Public Health

**Alexa McCray, Ph.D.**

Countway Library  
Harvard School of Medicine

**Dharma Cortes, Ph.D.**

Cambridge Health Alliance

**Rosalind Davidson, Ed.D.**

Harvard University School of Education [Ret]

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## The Health Literacy Environment of a Healthcare Facility

The 2003 Health and Human Services Report: *Communicating Health*, the 2004 Institute of Medicine report, *Health Literacy: A Prescription to End Confusion*, and the newly released 2010 *National Action Plan to Improve Health Literacy* - highlight the two core components of health literacy:

- Literacy skills of individuals
- Literacy demands and expectations of health systems.

Health literacy is not a characteristic of individuals alone but is, instead, an interaction between the skills that people have and the demands that systems make. We must consider literacy in context.

We live and work in literacy-rich environments. Signs and billboards are everywhere. Streets, public squares, buildings, agencies, institutions are named and numbered. The inside hallways and offices of government programs and service agencies are filled with signs and postings, informational booklets, and forms. People in our society are expected to locate places, follow signs, understand oral directions and instructions, and complete forms that may be part of an entry process. Visitors to government offices and healthcare facilities are often faced with words in print and in spoken exchanges that are not used in everyday encounters. In addition, visitors are expected to apply a variety of literacy skills as they find their way within the institution or facility, interact and speak with people working within, complete required paperwork, and seek guidance, help, and services.

The exercises in this packet are designed to help hospitals and health center staff members begin to consider some of the characteristics of their workplace that help or hinder a visitor's ability to make his or her way about. This initial focus is on physical navigation. However, a full analysis of the health literacy environment of hospitals and health centers moves beyond attention to signs and directions and will enable us to consider how to reduce demands, how to make our expectations of patients and their families more in line with people's skills, and how to better serve patients and clients. Please review the full manual, available on line at [www.hsph.harvard.edu/healthliteracy](http://www.hsph.harvard.edu/healthliteracy).

Please consider using these materials as a friendly start. Users have found it to be enjoyable and insightful.

*Rima E. Rudd*



## PLANNING

### **Planning for First Impressions**

**First Impressions** consists of three activities and focuses on first impressions shaped by a phone call, a visit to the web page, and the walk to the entrance. The full set of activities set the stage for an examination of your facility through new eyes.

As you begin planning for **First Impressions**, please consider where your clients/patients live. Choose a neighborhood that may serve as a proxy starting point for a client or patient and family member coming in for services and care. This starting point will shape your inquiry as you use the phone and the web site [if appropriate] to find travel directions. You are provided with sample forms to capture the first impressions for phone inquiry, web page inquiry, and the walk to the entry point. Provide your colleague with the predetermined neighborhood and appropriate forms to complete.

### **Planning for A Walking Interview**

**A Walking Interview** will follow. This activity consists of six stages and focuses on physical navigation. It is planned for approximately one hour of time. This activity should be undertaken in pairs.

As you begin your planning for **A Walking Interview**, please consider the most logical starting point. You may choose to start at the main facility entrance, the entrance to a specialty area, or at a commonly used area such as the parking lot. If several people will conduct tours at your facility, have each pair begin at a different entry point. Identify the place that patients and visitors are most likely to use in order to enter the facility. Each pair will meet at the designated starting point and then observe and comment on this area.

Next, decide, in advance of the meeting with your partner, an appropriate location to walk to. You might consider the place where people can obtain a copy of their medical records, a laboratory, or a location for imaging studies. Other key locations include the pharmacy, the primary care areas, specialty clinics, or a different setting that is central to your institution. Once again, if multiple teams are engaging in the *Walking Interview*, each team should be assigned to a different location to gain broader perspective. Each pair will move on from the entry to find their way to a specific place that is commonly used by patients or their family members. Set a convenient time to meet, preferably one that does not interfere with patient activities.

## FIRST IMPRESSIONS

First contact with a healthcare facility is often over the telephone or through the facility's website. The goal of this activity, to be completed prior to the *Walking Interview*, is to capture the first impressions that clients, patients, and their families might experience through a phone interaction or a website visit as they attempt to find driving and public transportation directions. In addition, the walk to the entry point from the parking lot or from public transportation further shapes an impression of the facility.

### 1. TELEPHONE

Call the main telephone number of your healthcare facility and attempt to get directions from a residential starting point – perhaps from an area where some patients live. You may request directions via public transportation, by car or both.

### 2. WEBSITE

Visit the facility website and attempt to get directions to the facility from an agreed-upon starting point. You may request directions via public transportation, by car or both.

### 3. WALK TO THE ENTRANCE

Walk to the facility from the parking lot or from the most appropriate public transportation stop. You will observe the ease or difficulty involved in making your way to the front or main entrance.

**Use the forms on the following pages to document your experience.**



## First Impressions: Telephone

### 1. The 'voice' on the telephone:

- The telephone was answered by:
  - Automated system
  - Person
- Choose a word that best describes the quality of the voice:  
\_\_\_\_\_

### 2. If automated [If a person answered the phone, turn to #2]

- There was a menu option for an operator connection
  - Yes
  - No
- How many menu options did you have to listen to before you heard the operator option?
  - 1
  - 2
  - 3
  - 4
  - 5 or more
- There was a menu option for directions to the facility?
  - Yes
  - No
- How many menu options did you pass through to get directions?
  - 1
  - 2
  - 3
  - 4
  - 5
  - 6
  - NA
- There was a menu option to repeat the full menu?
  - Yes
  - No
- Overall, what was the speed of the menu option?
  - Very fast
  - Fast
  - Slow
  - Very slow
  - NA

### 3. If a person answered the phone:

- What is the tone of the person's voice?  
\_\_\_\_\_
- What is the speed of the person's speech?
  - Very fast
  - Fast
  - Slow
  - Very Slow

### 4. Was the call successful?

- Yes
- No
- Comment:  
\_\_\_\_\_

### 5. Please comment on the impression a caller might have of the facility based on this phone call.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## FIRST IMPRESSION: WEBSITE

1. Is there a link to directions on the homepage?

- Yes       No

2. How many pages did you click through to find directions?

- 1     2     3     4     5 or more     NA

3. If online directions are provided how many of the following were included? [check all that are appropriate]

- Driving directions  
 Parking information  
 Directions by public transport

4. Is a map available?

- Yes       No

5. Is there a printer friendly option?

- Yes       No

6. Please comment on the impression a caller might have of the facility based on this website.

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## FIRST IMPRESSIONS: THE WALK TO THE ENTRANCE

1. Are there sufficient and appropriate signs to direct you to the main entrance?

Yes     No

2. Are there signs at the outside the main entrance to indicate you have 'arrived'?

Yes     No

3. Are staff members visible at the main entrance and available for questions/assistance?

Yes     No

4. Describe the 'journey':

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5. Identify barriers, if any:

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6. Identify facilitating factors:

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7. Please comment on the impression of the facility based on this experience.

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## A WALKING INTERVIEW

The Walking Interview exercise is designed for two colleagues -- one of whom conducts the exercise and is referred to as the *Guide* and another who is responsible for sharing impressions and is referred to as the *Observer*.

Planners in large facilities may want to consider engaging several pairs of colleagues for this work. The *Walking Interview* is designed for two people. If multiple teams will engage in the *Walking Interview*, each team should observe and explore different entryways, destinations, and facilities. The diversity of locations will allow for broader observations and offer opportunities for richer discussions. The person serving as the *Guide* should make choices of locations in advance of the *Walking Interview*.

We address this introduction and overview to those planning to conduct this exercise and the people who will serve as the *Guide* in each paired set.

Do not share this packet with the person/people who will serve as *Observer* until after the activities are completed. The *Observer* will then be able to approach the activity with a fresh perspective. Please review the full packet of material so that you can have a clear idea of roles and activities.

### THE PROTOCOL

The *Walking Interview* activity should not interfere with any patient activity nor should it divert staff from their normal activities or movement. If, for example, patients or family members are waiting for help at an information desk, participants in this activity should wait until all others are served.

The *Walking Interview* activity includes time for short discussions after an activity and time for a longer debriefing and reflection at the end. These discussions should take place in a comfortable location that does not interfere with the work or activities of staff or visitors.

### THE PROCESS

The *Walking Interview* is designed as a walking **dialogue** or **interview** between an *Observer* (the individual who is newest to the facility), and the *Guide* (the person who might be more familiar with the facility). The *Guide* will offer direction about the activities and pose questions. For example, the *Guide* will direct the *Observer* to enter the facility and look around. The guide might say:

- *Imagine you are coming here for the first time.*
- *Take a few minutes to look around and then come back to me.*

The guide might then ask:

- *What are your thoughts about the point of entrance?*
- *Can you comment on the different signs and postings you see?*

The partners will have an assigned task, such as: *walk to the place where people go to get copies of their medical records or release of information office.* The *Guide* will provide the instructions.

The *Observer* will take the lead in the walking activity and talk aloud as she/he walks about and makes decisions. For example, the *Observer* might say:

- *I notice posters with health services enrollment information for health plan members.*
- *I am taking a right turn at this corner because I see an overhead sign that says 'Health Information Services' with an arrow pointing to the right.*

The *Guide* will remind the *Observer* to share thoughts as they move along. For example, the *Guide* might state:

- *I see you took a left turn; why did you make that decision?*

The *Walking Interview* activities should take about 1 hour. At the end of the activity, find a comfortable place to sit and debrief.

**The following sections offer step-by-step suggestions for the six *Walking Interview* stages.**

## **WALKING INTERVIEW STAGE 1**

## OBSERVATIONS AT THE ENTRY POINT OR LOBBY

The first part of the *Walking Interview* focuses on the overall literacy environment of the entryway. You may choose to start at the main facility entrance, the entrance to a specialty area, or a commonly used entry point, such as an entrance from the parking lot.

**Guide:** Identify a place to have a brief conversation. Ask the *Observer* to enter the assigned area and look about and then come back together for a brief talk. Once the *Observer* has taken a few minutes to look about, have a brief conversation.

### Discussion Points

- How would you describe the overall atmosphere?

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- What do you notice first?

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- How do you feel?

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- What is the pace or level of activity?

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- What do you notice about the use of the printed word?

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- How numerous and how clear are the signs and postings?

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- For whom are the signs and postings primarily designed?

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For example: Facilities Staff, Patients

- What do you notice about pictures and visuals?

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- For whom are the pictures and visuals primarily designed?

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- Who or what is available to help you find out where you need to go?

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## WALKING INTERVIEW STAGE 2

### DIRECTIONS/SEEKING HELP

The second activity is focused on available help for navigation. Destinations of interest include the office where people can obtain a copy of the medical records or the release of information office, the laboratory, imaging studies, or other key destinations specific to the specialty services offered by your facility. The *Guide* should identify a specific destination in advance of the meeting.

**Guide:** Tell the *Observer* the assigned destination. Ask the *Observer* to take a few minutes to use available help/aides to figure out how to begin. The *Observer* should do what he/she normally does in a new place. Tell the *Observer* to come back so that the two of you can have a brief talk before you begin the journey.

#### Discussion Points

1. What did you do to get directions? \_\_\_\_\_  
Is this what you would ordinarily do? \_\_\_\_\_
2. Do you now have a sense of where to start and how to get there?  
\_\_\_\_\_
3. What additional resources would have been helpful? \_\_\_\_\_
4. If a map is available, take a moment to observe and comment.  
\_\_\_\_\_
5. If you spoke to facility staff, was the response warm? Friendly?  
Helpful? \_\_\_\_\_
6. Additional Comments:  
\_\_\_\_\_

NAVIGATION

This section of the *Walking Interview* focuses on navigating the facility to find a specific location or service commonly used by patients or their family members. As is noted earlier, destinations of interest include a place where people might obtain a copy of their medical records, the laboratory, imaging studies, or other key destinations specific to the specialty services offered by your facility.

**Guide:** Tell the *Observer* to take the lead. Remind the observer to speak aloud during the process. If needed, remind the observer to highlight any decision cues.

**Analysis:** After reaching the destination(s), please find a comfortable place to have a conversation and reflect upon the navigation exercise.

**Discussion Points:**

1. How did you know when you reached your destination?

\_\_\_\_\_

2. What tools were available to help you find your way?

\_\_\_\_\_

- Comment on clarity, frequency, and placement of signs.

\_\_\_\_\_

- What cues along the way let you know that you were on the right path?

\_\_\_\_\_

3. What else did you observe?

\_\_\_\_\_

4. Please comment about the overall process

[ \_\_\_\_\_

- What was most helpful? \_\_\_\_\_

- What got in the way? \_\_\_\_\_

OBSERVATION

This section of the *Walking Interview* explores the literacy demands or assumptions that patients face as they access services. The *Guide* and *Observer* will now spend time at the 'destination'.

**Guide:** Ask the *Observer* to look about with specific attention to postings, processes, and potential barriers. Once the *Observer* looks about the area, move to a comfortable space to have a discussion.

**Discussion Points:**

1. What did you observe about the signs, postings, and available reading materials?  
\_\_\_\_\_
  
2. Consider how patients and/or family members begin the entry process. What did you observe about the following:
  - Process for registration or sign in \_\_\_\_\_
  - Turn for service: how does the patient know when it is his or her turn? \_\_\_\_\_
  - Resources: who or what is available to help patients and their families navigate the process? \_\_\_\_\_
  - Consider how easy or difficult the process might be for someone who does not read well.  
Comment: \_\_\_\_\_

Additional Comments

\_\_\_\_\_

\_\_\_\_\_

REFLECTIONS

Find a comfortable place for sitting and talking. Consider following items as talking points for the debriefing sessions.

1. Overall use of the written word

- For whom are the signs and posting written?  
\_\_\_\_\_
- What use is made of technology, such as TV screens, computer stations, and informational kiosks?  
\_\_\_\_\_

Comments:

\_\_\_\_\_

2. Navigation Aides

- Who or what was available to help you find your way?  
\_\_\_\_\_
- Were the maps or directories available? Easy to use?  
\_\_\_\_\_
- Were staff people available to help you find your way?  
\_\_\_\_\_
- Comment on ease of communication with staff.  
\_\_\_\_\_
- Additional comments:  
\_\_\_\_\_  
\_\_\_\_\_

*Continued on next page*

### 3. Signs [please see following diagram]

- Comment on the variety of signs and placement  
\_\_\_\_\_
- Were certain signs or postings easier to use than others? What made them more helpful?  
\_\_\_\_\_
- Were the same terms consistently used on maps/signs/directories?  
\_\_\_\_\_
- Were the words used on signs everyday or medical terms?  
\_\_\_\_\_
- Were key places such as elevator banks, hallways, or wings signed and named?  
\_\_\_\_\_

### 4. Language

- Comment on the use of acronyms and/or medical words  
\_\_\_\_\_
- Was access to translation services noted?  
\_\_\_\_\_

### 5. Overall ease

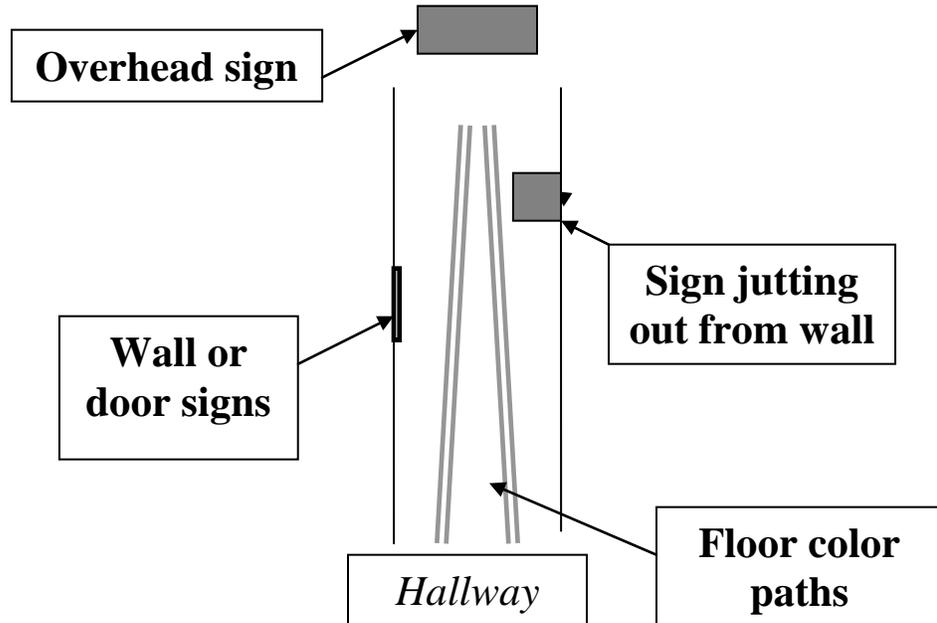
- What hindered navigation?  
\_\_\_\_\_  
\_\_\_\_\_
- What helped?  
\_\_\_\_\_  
\_\_\_\_\_

### 6. Added notes or observations

\_\_\_\_\_  
\_\_\_\_\_

## Use of Signs

The diagram below shows a hallway and the types of signs most commonly encountered. Below, check the types of signs you found as you navigated the health facility and circle which kind was most common:



Please check all of the kinds of signs that you saw on your tour:

- Overhead signs
- Wall signs
- Sign jutting out from wall
- Floor color paths

Please comment on the ease/difficulty of locating signs

- What was difficulty?

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- What helped?

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## WALKING INTERVIEW STAGE 6

### FEEDBACK

This *Walking Interview* activity might well offer enough insight into needed changes. Alternatively, this activity might be the start of a more rigorous examination of the health literacy environment of your facility. In either case, changes will require resources and a process will be needed to determine priorities for action steps. Consider next steps and how to share your observations and insights with others at your facility. You may want to follow this activity with some of the following:

- **Additional walking interviews:** Involve more colleagues and/or patients
  - Conduct walking interviews with key decision makers
  - Conduct walking interviews with patient volunteers
- **Report:** Highlight facilitating factors and barriers
  - Prepare a written report with forms attached
  - Prepare a presentation with photos of facility characteristics that facilitate or impede navigation
- **Consider options and next steps**
  - Engage in a more in-depth assessment by examining written materials and use of technology
  - Form a health literacy committee
  - Develop orientation programs for all new staff
  - Develop education programs related to health literacy for all staff

**Reminders:** Be sure to identify those elements of your facility that contribute to a good impression and to ease of navigation in addition to those elements that may hinder access and navigation.