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Health Information Security and Privacy Collaboration

Sharing Health Information Nationwide...and Doing it Right: The Oregon Documentary and Step-by-Step Guide to Planning a Town Hall Meeting

Prepared for

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1. INTRODUCTION

Oregon joined the Health Information Privacy and Security Collaboration (HISPC) project in 2006 as one of the original 34 states and territories. During HISPC Phase 1, the Oregon team engaged a variety of stakeholders to identify and develop solutions to the most significant privacy and security issues facing Oregonians about implementation of electronic exchange of health information. Broad community input was sought to identify the challenges involved in maintaining the privacy and security of health information while enabling electronic health information exchange and to ensure acceptance of solutions. Stakeholders from health care, consumer, and privacy organizations participated throughout the project.

Oregon's HISPC work identified a need for greater communication with consumers about current health information privacy and security risks and how electronic exchange has the potential to mitigate those risks. It is also important to address the privacy and security concerns specific to an electronic environment. Our main implementation project was conceived to accomplish both of these objectives.

Our findings from Phase I led to the production of a documentary during Phase 2 entitled, *Sharing Health Information Nationwide ... and Doing it Right*. The documentary was produced as a way to educate and engage consumers on the privacy and security issues presented by electronic health information exchange. Oregon has a history of conducting town hall meetings to educate and engage consumers about health care policy issues. Therefore, the documentary was created to serve as background for town hall meetings focused on privacy and security in an electronic health information exchange environment. Our original plan involved adapting the town hall meeting strategy previously used in Oregon to accommodate the HISPC project goals. The original documentary is approximately 16 minutes long; a summary version 6 minutes in length was produced from the original.

This document is intended to be a step-by-step guide for planning and executing town hall meetings that use *Sharing Health Information Nationwide ... and Doing it Right* to lay a foundation of knowledge that will allow meeting attendees to have an informed discussion on privacy and security issues.

2. STEPS IN PLANNING A TOWN HALL MEETING

Steps in planning a town hall meeting are to:

- Articulate goals and expected outcomes for the town hall meeting.
- Choose a meeting venue.
- Recruit attendees.
- Consider other details.

2.1 Articulate Goals and Expected Outcomes for the Town Hall Meeting

It is helpful to establish a planning committee to help make decisions about the town hall meeting and to clarify the objectives and expectations for the meetings. A subset of a standing body, such as a HISPC Steering Committee or Washington state's Health Information Infrastructure Advisory Committee (HIIAC) is an efficient way to organize this group.

2.2 Choose a Meeting Venue

The venue for your town hall meeting can influence both the plan and outcome of your meeting. Meetings held in urban areas may draw more attendees and be easier for individuals with knowledge about electronic health information exchange to attend, whereas meetings held in rural areas may draw fewer attendees and, as a result, fewer individuals with the type of experiences and expertise you seek. The region or community you engage can also influence the town hall meeting. For example, Oregon began with meetings held in communities where there were nascent health information exchange projects. This made it easier to find partners in those communities willing to help with recruitment and meeting logistics.

Other considerations may be the density of the population or the degree to which providers are using health information technology. Venues should be accessible by many modes of transportation and offer attendees a comfortable experience. Because our meetings were scheduled to last 2 hours, we served water, coffee, and healthy snacks (fruit and nuts). Additionally, venues should be welcoming because these meetings are open to the public.

2.3 Recruit Attendees

1. Form partnerships with other organizations and groups.

Advocacy groups, consumer groups, provider groups, and civic groups are "trusted" among those organizations' members and can be highly effective in reaching attendees. Invitations from these groups to their members asking for member participation in the Town Hall meeting are very powerful.

However, the organizations contacted will need to see a clear benefit to their participation in the meeting in order to solicit attendees from their membership. Choose partner organizations carefully, with an eye toward shared missions and purposes.

Also, be sure to schedule meetings far enough in advance to allow for relationship building with organizations that may require more information before agreeing to work on this type of project.

2. Use public advertising.

Ads in the community section of the newspaper are helpful. Again, links to trusted community partners will increase credibility and attendance. In some regions, radio public service announcement are free and can be used to let folks know about an upcoming town hall meeting.

3. Post flyers.

Creation of flyers and distribution for posting can be effective and inexpensive. Public bulletin boards at clinics, hospitals, schools, community centers, and other public centers are recommended. Be sure to check whether permission to post or pre-approval of your materials is necessary before you post any flyers.

4. Post on websites.

Creating a blurb with a link that partners and interested parties can place on their web page is a quick, easy, and inexpensive way to share information about a meeting.

2.4 Consider Other Details

When you plan your town hall meeting, answer the following questions:

- Is it likely that you will need an interpreter?
- Will you need to provide a sign interpreter?
- Will providing child care help increase the attendance of your target population?
- Will providing transportation or a transportation reimbursement increase the attendance of your target population?

3. CONDUCTING THE TOWN HALL MEETING

Important components of conducting the meeting are to:

- Utilize a local host.
- Utilize a neutral facilitator.
- Set and keep to a meeting agenda.
- Set and enforce ground rules.
- Prepare project team members.
- Have clear next steps/publicize contact information.

Project team members responsible for the town hall meeting should attend each meeting to answer questions and provide accurate information. Representative members of your standing health information exchange or health information technology committee members are also good choices for this role.

3.1 Utilize a Local Host

Having a local host who is recognized within the community can be a great help. In addition to assisting with attendee recruitment, a local host provides a sense of familiarity and credibility for attendees. Attendees are more likely to feel comfortable with someone from their own community and more likely to speak candidly and freely, which will provide much more valuable information.

Suggested hosts are:

- local elected leaders,
- local physicians,
- local religious leaders,
- local business leaders, and/or
- local journalists.

3.2 Utilize a Neutral Facilitator

The town hall meeting facilitator(s) should be neutral—they should not work for any of the stakeholders involved in health care or health information technology. They should also be trained in facilitating difficult conversations with large groups.

In Oregon, we used the American Leadership Forum of Oregon Senior Fellows (ALF Oregon) as our facilitators. ALF Oregon was also instrumental in helping to find local hosts and partners as we moved into the more rural parts of the state. As with the local host, the

neutral facilitator provides credibility and professionalism, resulting in much richer and deeper conversations among the attendees.

3.3 Set and Keep to a Meeting Agenda

Distribute and/or post an agenda detailing how the meeting time will be spent. Allowing meeting attendees to know when they will have an opportunity to speak will reduce their concern about when they will get to have “their turn to speak” and enable them to pay closer attention to the conversation among attendees.

Sample Agenda

- Welcome—Local Host
- Explanation of Project and the purpose of the Town Hall—Project Team Member
- Explanation of Process and Ground Rules—Facilitator
- Preliminary Questions—Facilitator
 1. Using a show of hands please identify yourselves. How many of you are a(n):
 - Provider
 - Insurer
 - Technology professional
 - Consumer
 - Advocacy group member
 - Other (add a group of interest to your project team)
 2. By a show of hands, how many of you have concerns about the privacy and security of your health information?
 3. By a show of hands, how many of you would allow your health information to be exchanged electronically among your health care providers?
- View Documentary
- Questions from Project Team to Attendees

Now that you have seen the documentary, let's see if there has been a change in your assumptions about the privacy and security of electronic health information exchange:

 1. By a show of hands, how many of you have concerns about the privacy and security of your health information?
 2. By a show of hands, how many of you would allow your health information to be exchanged electronically among your health care providers?
- Questions from Attendees
- Explanation of next steps in project
- Distribution of contact information
- Thank you and close

3.4 Set and Enforce Ground Rules

Setting the ground rules for the town hall meeting is important. This is a great role for the facilitator: you will rely on this person to enforce the rules. We used the following rules at our meetings:

- Share the floor—make sure everyone has an opportunity to share their perspective.
- Seek first to understand, and then to be understood [Covey, S. (1989). *The 7 Habits of Highly Effective People*. Franklin Covey Co.].
- Speak from personal experience; no generalizations.
- Be respectful of other speakers' perspectives.

You may also consider setting a time limit on comments to help the facilitator move the meeting along.

Additionally, allow the facilitator to manage the attendees as they ask questions. He or she should refer each question to a project team member for a response.

3.5 Prepare Project Team Members

Project team members should be able to provide answers to the most frequently asked questions using the messages that the project team has been communicating with respect to each state's or project's stated goals.

3.6 Have Clear Next Steps/Publicize Contact Information

It is important to clearly explain the next steps in the project to the attendees and make sure they know who to contact with further questions. Now that the attendees have been introduced to the topic and the issues, they will be an excellent source to utilize as the project progresses.

4. LESSONS LEARNED

Our first six town hall meetings were not as well-attended as we had planned. The attendees were heavily weighted on the stakeholder side (providers, CIOs, and insurers) and weak on consumer attendance. We learned that advocacy groups and organizations are crucial to recruiting consumer attendees regarding these issues. Make the most of relationships with these groups.

The next sessions were held at previously scheduled meetings for disease support groups, public affairs forums, and business associations. The meetings provided a more balanced consumer voice. Additionally, the attendance was better overall, as these meetings have group members that can be relied upon to attend.

5. OTHER DISSEMINATION STRATEGIES

- Websites with self-guided questions and tutorials
- Booths at health fairs
- Booths at open enrollment information sessions

The summary version of the documentary may be better suited to the alternative dissemination strategies.

6. CONCLUSION

A well-attended town hall meeting is difficult to accomplish; however, it can provide an engaging and informative forum to discuss the issues of privacy and security. Each community has its own idiosyncrasies that need to be accommodated in the planning process. Understanding the expected outcomes and goals before embarking on a planning mission will greatly increase the success of the meeting, as well as the experience for all involved.