REPRODUCTIVE HEALTH NATIONAL TRAINING CENTER

Video Transcript: Title X Policy Development and Implementation 101 Webinar

Meg: Alright, everyone. Welcome again to the Title X Policy Development and Implementation 101 webinar. Just a few things before we get started. First, we'll have time for Q&A at the end, so please type any questions you've got along the way into the chat. We'll collect them all up and then answer them at the end. Also, we will send out an email after the webinar that contains the slides and the links to the resources that we discussed today. So I have the pleasure of introducing our team today. Amy, I'll pass it to you first.

Amy: Thanks, Meg. Hi, everyone. My name is Amy Bourmatnov, and I'm a Program Coordinator on the RHNTC's Title X team. I supported the Title X Policy Development and Implementation Peer Learning Group that was conducted earlier this year, and I'm happy to be with you again today to support the webinar. And I'll pass it to my colleague Bemi.

Bemi: Thanks, Amy. Hi, everyone. My name is Bemio Oworu. I'm a Senior Technical Associate on the RHNTC, where I'm a grantee liaison and a TTA provider. I provide technical assistance and help programs strengthen their policies, improve data collection, and deliver high-quality care. My background is in maternal child health, and I'm especially interested in the intersection between Title X and maternal health. And I will pass it to Cora.

Cora: I'm Cora Rabenberg. I'm a Title X grantee and provided consultation to the RHNTC in hosting a Title X policy development and maintenance peer learning group earlier this year and then assisted those participants with their policy development process. Before my time as a grantee, I provided direct patient services for 17 years as a registered nurse in a variety of specialties, including obstetrics and gynecology. And during my time at that healthcare system, the last few years were spent as Director of Clinic Operations. And back to you, Meg.

Meg: Thanks. So, my name is Meg Sheahan. I am a Senior Technical Advisor at the RHNTC. I've supported many Title X grantees and subs over the years with their policy development and implementation processes, including most recently through the peer learning group that this team worked on together. Before coming on board at the RHNTC, I directed the Title X program in the U.S. Virgin Islands for almost a decade, which involved lots of policy development and wrangling. So, our objectives today, by the end of this session, we hope that you'll be able to review the Title X Program Expectations and the role of policies in ensuring compliance with these standards. We hope that you'll be able to recognize how well-crafted policies and procedures can promote access to equitable, high-quality family planning services. We will examine key steps in effective policy and procedure development and implementation processes and strategies to action them. And we will identify some resources that you can use in your agency to strengthen and maintain your Title X policies and procedures.

Bemi: Alright, so we're going to begin today by exploring how strong policies align with Title X expectations, support service accessibility and strengthen your agency's ability to provide high quality family planning-centered care. Policies are the foundation for Title X program compliance. Title X requires agencies to follow federal statutes, regulations, and program expectations, and you're required to have clear, written policies that ensures alignment. Policies also provide a structured approach to meeting requirements around confidentiality, informed consent, financial access, and service delivery. They also help agencies prepare for OPA site visits, audits, and monitoring reviews. Title X expectations for providing family planning are outlined in the statute, the implementing regulations, and the Title X handbook, which are all available on OPA's website. These expectations include the provision of high-quality family planning services, adolescent services, effective program administration, financial accountability, and more. All Title X projects are expected to maintain and regularly update written policies, protocols and procedures that demonstrate compliance with all Title X program requirements.

Bemi: Title X agencies are also required to have written policies in accordance with the Title X statutes and regulations. Strong policies help agencies comply with federal expectations such as confidentiality, inclusivity, and non-coercion. They also support access to services by standardizing procedures, reducing barriers, and prioritizing client-centered care. Ultimately, good policies enable organizations to deliver high-quality, accessible services that meet community needs while maintaining compliance and operational efficiency.

Cora: A policy or framework for policy development and implementation is a written document, a structured approach that outlines the process that your agency will use to create, manage, and enforce policies. It provides a clear set of procedures to ensure that your policies are consistent and effective and aligned with Title X requirements. The policy or framework typically describes your policy development process. Or the steps and standards of drafting and reviewing policies. It will detail what's required to obtain necessary approvals from relevant authorities in your agency. It will also describe the implementation or the procedures for communicating, instituting, and monitoring the policy across the agency. Finally, the policy or framework should cover review and evaluation, a process for periodically assessing the policy's effectiveness, and making adjustments as needed.

Cora: Why have a policy development and implementation policy or framework? Because it outlines a plan and this plan ensures that policies are well-designed, they're properly executed, and regularly updated to meet changing needs. It tells you what to do and how to do it. It's the foundation of a solid set of effective policies.

Cora: Alright, so we're gonna see where we're all at with this. Please click on your response. Does your agency have an official policy or framework that outlines the process for developing and implementing policies? Alright. Thank you, everybody. We're gonna take a look at the results. So it looks like 34% of you say yes and it's effective. 37% say yes, but it needs help. 15% said no, and then 14% of you don't know. So thanks everybody for participating in that. Alright, Meg.

Meg: Let's dig into this process. Next, we're gonna focus on these steps that are in front of you on the wheel. These are the steps of policy and procedure development and implementation. And these steps really are the foundation of this process. While these steps and how they unfold might look slightly different from one agency to the next, thinking through them methodically will help you develop your plan. These steps are not a one and done policy development and implementation is actually a, it's a long process. It's an ongoing process that takes place realistically over the course of years. You start at the beginning, step one, and then you keep moving from one step to the next, taking inventory of what needs to be done in that step and doing it and then moving on to next step and then back to the beginning to start again. So, high level. Our steps are, first, identify who's on your team. Second, identify what policies you need. Third, you're gonna formulate those policies. You're gonna literally write them out. Fourth, adopt the policies, make them official. Five, implement them. Six, monitor and evaluate these policies. Then review and update them based on the results from your monitoring and evaluation. And then communicate updates with your team. The key, of course, is to iron out with your team how each step will be done and by whom.

Meg: So to do this, I highly recommend using the Title X Policy Development and Implementation Worksheet that you see on the screenshot on the right side of this screen. It's available on rhntc.org and we're going to chat the link now so that you can open it and follow along as we talk through each step of this process. This worksheet takes the eight steps of the policy development and implementation process that I just reviewed and it helps you pull each one apart. You can use this worksheet to structure conversations with your team, and in so doing, you're gonna capture key points, decisions, and actions that need to be taken. And these conversations and points that you capture will inform your policy on policies or your framework.

Bemi: Okay, now we're going to go into a little detail on these steps. So the first step is to identify your team. To ensure that the policy development process stays on track, identify a team lead who will guide the effort. The team should include people with diverse skills, knowledge, and roles relevant to the policy area, as well as staff and stakeholders who will be directly impacted by the policy. Clarify everyone's roles on the team to ensure that everyone understands their responsibilities within the process.

Bemi: Next step, step two, identify exactly what you need policies on, or if you already have a set of policies, identify which ones need to be updated. You can use the Title X Policy and Procedure Checklist available on rhntc.org to inventory your agency's policies and procedures to ensure you have all the Title X program expectations covered. We'll chat the link to the checklist now. Your agency may require policies above and beyond the Title X expectations, so of course you'll want to discuss that with your team as well. We often hear that a common priority is ensuring that policies remain current with the Title X requirements, so two key resources that can help you with this are OPA's webpage on Title X statutes, regulations, and legislative mandates, and the Title X Program Handbook. Also, when changes to the Title X requirements occur Both OPA and the RHNTC send out email notifications. So keep an eye out on OPA's webpage and the RHNTC e-news and emails. And also the slides with links will be available after the webinar.

Bemi: The next step is to formulate the policies, to literally develop and write the policy based on the Title X expectations. If you're starting from scratch or you're just even updating, it's helpful to research approaches to help you determine what works best for your agency's needs and to help develop policy contents, policy language, and also think through the procedure steps. Most of the time, you don't need to reinvent the wheel. You can search online for publicly available Title X policy sets for you to take a look at and consider various features of. Your policy should have a well-defined purpose and clear goals that address the identified problem or need. Policies affect a variety of groups, which can include employees, clients, citizens, or the community. Involving stakeholders in the formulation process helps ensure that their needs and perspectives are taken into account. Assess the practical aspects of implementation including available resources such as financial, human, technological, timeframes, and capacity. And also ensure that your policy can be realistically enforced.

Bemi: So let's think about the policy document itself. The nuts and bolts, how it's structured and organized. Effective policies and procedures will have a descriptive title, the date of the last update, a stated purpose, and clear simple language. They will also include sufficient detail, but not too much. They'll be easy to navigate with formatting, like headings and bullet points. And of course, they'll comply with Title X and other laws and regulations. People's roles and responsibilities should be clearly defined with actionable, logically sequenced steps. Provide supporting resources, preferably linked. And also, finally, the individual policy documents should follow the same consistent format and should clearly communicate any changes made from previous versions.

Cora: All right, step number four, adopt the policies. Our next step, once the written policy itself is finalized, is to formally adopt the policy. That is, obtain formal approval by the relevant decision-making body.

Cora: We've got a few tips for you on policy adoptions and just kind of getting your ducks in a row before you present your policies to the person or people responsible for approving them will make this as quick and easy as possible. First, think through who exactly needs to sign off on this policy and who should and who should not hold responsibility for approving which policies. So for example, it may not be reasonable to ask an administrative program director to sign off and approve clinical policies. And it may be not reasonable to have the medical director sign off on fiscal policies. So identify the relevant role or committee for approval of each type of policy. It's also helpful if you understand their expectation, preferences, and prior decisions on similar matters so that you incorporate these considerations to your process. Next, ensure your policy supports strategic objectives. Make sure that you can speak to how it addresses specific needs or compliance requirements, including Title X expectations. Involve stakeholders during the drafting process. Gather their feedback to identify potential snags or improvements so that don't have to backpedal and make changes after the fact in order to make your policy appropriate to your setting. Include the people who will be responsible for carrying out the work on the ground, in addition to leadership, such as department heads, legal teams, and compliance officers. Of course, you will have formulated your policy for clarity, which Bemi just described earlier. So next you'll use the correct protocol and timing. Most people don't like when things that they have responsibility for are thrown at them by surprise, when, with a little planning, the process could feel organized and controlled. Submit the policy through the official channel or process, letting them know in advance it's coming. For example, stick to a timeline that you've communicated and/or added as an agenda item at a meeting. Then be prepared to explain and defend the proposed policy. You may get quizzed a bit on why the policy and procedure contains the content and steps that it does, so make sure every piece of the policy is well considered, justified, and makes sense in your context. Be ready to answer questions about the implications of the policy. For example on workflow, how the policy will be enforced and implementation will be monitored. You'll want to address any feedback they have promptly and communicate recommendations or changes back to stakeholders transparently. Finally, record the decision clearly for accountability, for example in meeting minutes or running notes, and then place the signed or ratified version in a central location, like a central drive where everyone who needs it can easily access it.

Cora: Alright, so before we move on, we'd love to get a quick sense of where everyone's at. So please take a moment to respond to the poll on your screen. If someone asked you to explain how to implement a policy right now, your response would be, so it looks like about 45% of you chose C. I've got the basics, just don't ask me tough questions, so that's good. Um, next would be D, I'm confident I can hold my own in a conversation, which is great. Um, and then we're followed by about 13%, say I kind of know, but I might make, make, uh, make up a few parts. And then we are at 2% for bring it on and 4% for phoning a friend. Alright, thank you.

Cora: Alright, we're gonna move on to step number five then, which is implementing the policies. So once you have formal approval and sign off by the decision-making body or person, your next step is to implement the policies, implementation includes allocating resources so that staff have the tools they will need to actually do what the policy defines they will do. It involves communicating the policies to the staff and training them on the policy and procedure and what their roles are in executing them. Basically, this is the step where the policy is put into action. It involves ensuring that the policy is effectively rolled out to the intended staff and then staff carrying out the planned activities.

Cora: So we do have some tips for policy implementation. So to ensure successful implementation, identify the necessary tools such as software, templates, forms, and equipment, and then consult staff directly about what their needs are. Centralize all relevant materials in a shared drive or internal hub, and communicate plain language tailored to each team member or department. Disseminate the policy through multiple channels, like email, summaries with links, newsletter highlights. In-person or video staff meetings with Q&A, and pinned intranet posts. Then you'll want to offer follow-up reminders or spotlight a policy of the week to maintain awareness. Provide tailored guidance for different roles using a mix of live sessions, on-demand resources, and interactive elements like quizzes or case studies to support engagement and understanding.

Meg: Alright, so step six, and this is the bugbear for a lot of programs. Monitor the policies. Once the policy is implemented, it's really important to monitor it. You can't just put it out there in the world and expect it, unfortunately, to take care of itself and do itself. You have to monitor it and evaluate its progress. To monitor and evaluate the policy, we need to keep track of how it's going as it rolls out, and we need to gather data on its effects. This data might include numbers like performance stats. And it might also include things like feedback from the people involved in implementation. Through this monitoring, we can learn all kinds of things. For example, that the policy presents a unique challenge for some people and we need to address this challenge. Or we might learn that we don't have enough resources or we don t have the right resources to actually carry out the policy. So, we can collect data through a variety of different mechanisms. It might be through surveys, through interviews with staff, or by looking at performance trends over time. When evaluating the policy, we need to check in and just make sure that it's meeting its goals, and probe into both the good and the not so good, bad results, and make adjustments where we need to. Obviously, how you monitor and evaluate each policy is specific, and it's tailored to that policy. And it's a good idea to develop your monitoring and evaluation strategy as you develop the policy. So you kind of do it in parallel so that you can roll out the monitoring and evaluations strategy and process as you roll out the policy itself. So that you can get information from the start that you an action earlier in the process that way. So as you develop your policy, think about the implementation challenges that you anticipate will arise, as well as what data will demonstrate to you that the policy is working effectively, or maybe that it needs some adjusting. Think about how you'll collect this data and put mechanisms into place to actually collect it.

Meg: So, some tips for monitoring. First, leverage existing structures. Incorporate policy monitoring into your routine data collection processes and staff meetings, or use standing agendas to regularly review policy implementation and challenges. Second, assign ownership. Designate a staff person or a team who will be responsible for tracking each policy and for reporting on its effectiveness at regular intervals, like quarterly, for example. Next, develop a feedback loop. Create a process to not only collect feedback with staff and partners, but also to communicate findings back to them and act on it and let them know how their feedback is being applied to improve the policy in the process. It's also a good idea to find a mechanism for encouraging and receiving anonymous feedback so that you can capture concerns or barriers that people might be hesitant to report. And so you might not be aware of otherwise. Finally, document and share. Maintain documentation of what is working and what's not and the adjustments that you make. This kind of record over time it can support internal learning amongst your team So you can do better and better and it can also be helpful for funder or compliance reporting.

Meg: Next, it's important to review the policies regularly. Many agencies do or aspire to do an annual review and or they conduct ongoing reviews, kind of rolling reviews over time. It really helps to have a clearly defined schedule for conducting reviews with clearly defined responsibilities within that. So in other words, who's gonna conduct this review and when will they do it? When will it be done by? During the review consider are these policies, are they actually effective? Do they accurately reflect what needs to happen? Do they accurately reflect what is happening? And do the procedures clearly spell out how to do it, how to the job? And are they feasible and realistic to implement? Have more effective practices that serve the policy better come to light through your monitoring and evaluation processes or through feedback that you receive. If the procedures aren't being implemented as outlined, it's important to ask why. Like, are people getting to the same place in the end, but they're doing it in a different or more efficient way? Or do they have barriers to actually implementing the procedure and they're not quite meeting the mark in their actions as a result? In that case, what needs to be adjusted? So these considerations, as well as most current guidance, executive orders, et cetera, need to be incorporated into your updates.

Meg: So some tips for reviewing and updating policies. First, begin the policy review by clearly defining the purpose and the scope of the review, outlining why that review is necessary in the first place and what specific areas will be examined. Engage key stakeholders, including specifically employees of all different role types involved in implementation. Also the managers who are responsible for overseeing the process, and for example, others like legal counsel, to ensure diverse perspectives and that operational needs are met at every level. Assess current policies for clarity. Make sure they're clear. Make sure the policies are accurate according to the guidance and according to what your team is doing. Make sure that they are consistent and they are legally compliant. Also, you'll need to identify any gaps or outdated content or ambiguities within the policies and procedures. So you'll gather all of this information and then you'll use these insights to draft updated, easy to understand policies. Once you do this review and updating, it's really important to communicate changes clearly to all stakeholders, addressing any questions and providing guidance. Being ready to meet a little bit of resistance if what the updates require is a change in practice. And also monitor legal and regulatory updates to keep policies current. And finally, leverage your technology to streamline the review, revision, and communication process.

Meg: So we've got a little poll for you here. Let's see how your agency stacks up in the exciting world of policy review. Answer honestly. You are in a safe space. No one's going to know how you answered. How often does your agency review and update its policies? Okay, let's end this poll. All right. People who boldly and bravely responded D, 3%, "wait, we're supposed to do that?" I love your honesty. Um, people who responded C, "only when something breaks or becomes illegal," again, I love your honesty. Um, but then we've got about 50%, a good half who's saying "when someone remembers we do it and they panic and then we do it." Um, and then finally about 37% say, "we do this like clockwork. We've got a review and a calendar and everything." All right. Good job. Good job, everyone. Thank you.

Meg: All right, so our next step in this process is to communicate the updates to the staff. Honestly, this is a tough part too. They're all tough parts. This work isn't easy. Communicating policy updates effectively with staff is really crucial to ensure that they have clarity on what they're supposed to do. That they are able to comply with the policies and that they're able, since they are the boots on the ground, to implement the policies smoothly. It's a good idea to use multiple channels to reach staff because we all know, right, like when we're at work and we're checking our email, we get 50 emails a day. We get 50, you know, internal like Slack messages or whatever your internal communication system is. We got a bunch of communications. They flash across our desk and we don't always rest on them. So it's a good idea to use multiple channels and use them repeatedly. So use email. Talk about it in meetings. Use your internal messaging system. Talk about it at your morning huddle. The communication that you use should use clear, consistent and concise language. So be messaging literally the same words in all of these different modalities. And also the messages should come from a variety of directions. It should come from your senior leadership as well as your managers. So that the importance of this message is consistently reinforced by every level in the organization. Top leadership and managers should have a chance before this point to thoroughly discuss the policy and how it will affect all different layers of staff, all different types of staff roles. Any concerns that managers have about the actual implementation process should be addressed before changes are finalized because they're going to be the ones who need to be equipped to roll out the change and manage the impact of the change on their teams and on their workflow. In the communication, it is really helpful to summarize the changes right up top, like literally top row of the email, top row, of the agenda. It's also helpful to explain why the policy is updated. We all work better when we understand the why, right? So understanding the rationale behind the update can help staff get on board with the change, because change is hard. Um, if possible offer training, especially if the change of policy requires new skills or new processes or workflows. And of course, this is especially helpful for changes that could affect day-to-day operations. It's really important to get and to maintain buy-in, to maintain transparency in your communications, what you're changing and why, and to implement a process that will allow staff to ask questions and to provide feedback, to receive responses, and also to see how their feedback is being incorporated and considered. It is probably going to be helpful to do follow-up and reinforcement of the policies and changes. So we can't just kind of release the policy one time and say, okay, our work is done. We need to circle back and circle back, and follow up. So this follow- up might include reminders over email. It might include check-ins at meetings to see how implementation is going, to ask if there are any issues, and to reinforce the policy. The goal in this communication is to make sure that staff feels informed and supported and comfortable with the policy changes and how to implement them and to make them know that their feedback is being considered and incorporated. Clear, consistent messaging and training and opportunities for feedback help ensure smoother adoption of the policy.

Meg: So some tips in this, effective communication starts with knowing your audience. Tailor your messages to their roles, to their level of understanding, to their preferences regarding how they receive communication and training, and use clear, jargon-free language. Recognize that different people also absorb information in different ways. So again, use a mix of communication channels, email, internet posts, team meetings, one-on-one conversations. Reinforce key messages by repeating them across platforms with consistent words and language, and if you have the resources and capacity, consider visual aids like infographics or videos to clarify complex information. Again, it can't be overstated, keep all communication clear and concise and easy to understand to ensure that the message is accessible and it's impactful.

Cora: So earlier this year, a group of grantees and sub-recipients participated in a policy development and implementation peer learning group where we worked through these steps. They strengthened their policy development process. Key lessons that they reported back include the importance of maintaining a manageable list of policies to prevent overwhelm and ensure effective implementation. Collaboration with other agencies and engagement with impacted stakeholders during the drafting strengthens policy relevance and buy-in. Using clear, compliant language and focusing content on primary sources, such as the Title X Handbook, enhances accuracy and alignment. Additionally, referencing templates and existing resources like the RHNTC Title X Policy Templates help streamline the process and avoid duplicating efforts. Some more lessons from the field are to keep policies effective and up to date, establish a formal review process with a regular schedule and a dedicated review team with clearly defined roles. Limit participation to essential reviewers to maintain focus and efficiency. Ensure policy updates are communicated clearly and consistently to staff using centralized systems that provide easy access while allowing for flexibility where needed. Monitor implementation through both qualitative and quantitative data to evaluate the impact and identify areas for improvement.

Cora: We also, after this PLG, highlighted Yavapai County Community Health Center's policy work and achievements in this spotlight. And Ray stated that the process shared through the Title X PLG has been invaluable. They were able to draw on decades of collective experience, which gave them a strong foundation to build on. It's an ideal starting point for any program looking to strengthen its policies.

Bemi: All right, we've got some resources to share with you all today. So as highlighted earlier, the Title X Policy and Procedure Checklist can help you inventory your agency's current policies and ensure that they align with Title X requirements, while the Policy and Development Implementation Worksheet is a helpful tool to guide your team discussions and support your policy development process. The RHNTC Policy Templates offer ready-to-use documents that can guide the development of compliant policies. You can also use the program review tool for self-assessment to help monitor your subrecipients and service sites effectively, which include ensuring that policies are complete and that they contain the required information. Again, all of these links will be provided to you all after the webinar.

Bemi: Okay, we would love to hear from you all, what questions do you have about implementing or updating Title X policies and procedures? Please put your questions in the chat. All right, we have a question here. Meg, I'm going to start with Melissa's question. Melissa asked the group: "What is a manageable amount of policies?" Cora, do you want to respond to that one?

Cora: Um, so manageable amount. Typically, um, I would say you want to base it off of the templates that are provided by the RHNTC. I feel like that's kind of your starting point to be in compliance with Title X. Um, after time, when you're kind of reading through some of your policies, you might find that you've duplicated some I know when we have created some as a grantee, after you read through them a few times, you realize they can sometimes be merged into one. And so it does take time. You might start out with a large amount, but over time you start to kind of condense some of those.

Bemi: Thank you, Cora. Another question we got was, "Is there a recommended frequency for updating existing policies?"

Cora: So I can tell you what I do as a grantee and it has worked very well for us. We have a regular schedule where we do review our policies every year. It's the same time every year we have a policy committee. They know when to expect the review to take place. It is always during the summer months when they say it is a little bit slower with clients coming in, schools and universities being out. And so we have stuck to that. There have been some occasions, as we all know, where there might be a rule change or something and you might have to revise one or two policies, but we do the whole review one time annually.

Bemi: And I'll just pose this question to the group because Meg asked it: "What channels have been the least or the most effective in communicating policy updates to staff?" And you guys can put your responses in the chat. And while that's going on, there's a question here about: "Is there a template for the policy on policies policy? I see the helpful templates for the others." Meg, do you wanna take that one?

Meg: So at this time, we don't have a template per se for the policy on policies or the framework, But what I would recommend is looking through the working through the Title X Policy Development Worksheet because that actually will kind of walk you through the steps and walk you through the considerations that need to be in that policy. So you can almost take each step and sort of just adapt or tweak it a little bit into the, okay, so if the first step is to identify the team, who is the team? You know, write that into your policy. If the next step is, you know how, you know, if you need to think about how often you're going to do these reviews, for example, write that in to the policy. So I would, my recommendation would be to go through that worksheet and literally answer all of those questions that are posed in the worksheet and translate that into a document using a policy, you know, just a policy whatever policy format you use with the title on top, the date, the date that it was last updated or reviewed, a signature line, etc.

Bemi: Thanks, Meg. Another question that we got here is: "What is the makeup of your policy review committee?" Cora, do you want to take that one?

Cora: Yeah, thanks. So the committee consists of myself as the Program Director, we have a nurse consultant on our team. We have a contracted mid level clinician on our team. And then what I do is probably about a month or so before we start our review process, I send out an email to our previous committee members to see and confirm with them that they are going to participate on the next review. But also I like to engage additional members if it seems like we're lacking in a few roles. So specifically, right now on our committee, it seems we're very clinical focused with a lot of nurses and clinicians. And so I've been trying to get more front desk, back office, financial team involved. And successfully this year, we were able to do that and add on those roles as well to our committee.

Bemi: Thank you, Cora. And then another question we have here is: "How can we make policy education manageable for staff? Sending out updates or changes to old policies or training on new policies is one thing, but setting down a binder or digital folder with 100 plus policies in front of a new team member is not manageable."

Cora: Agreed, it is a lot. I think we have around 50 policies right now. And I guess what we typically do is those policies that have the highest impact affect the most people. We sometimes will hold like an all staff meeting shortly after we revise our policies. And then again, using all those different channels, we have a director in-person meeting once a year. That falls right after our policy implementation. And so we'll go through and summarize the major changes that occurred. We send out emails, we send out, we have different committees within our state program. And so if they, for example, I have a billing and coding committee. So I'll kind of highlight some of those financial policies that have been updated and try to tailor it a little bit more to the role that they play.

Bemi: Thanks, Cora. Another question here says: "For policies that relate to others, how would you suggest we manage those relationships, making sure that they stay up to date with each other?" Meg, do you want to take that one?

Meg: Yeah, I'm trying to find that question in the chat. Can you just repeat it one more time so it can sink in?

Bemi: For sure. Um, the question was by Caitlin Frazier and it says, for policies that relate to others, how would you suggest we manage those relationships, making sure that they all, the policies, I'm guessing, stay up to date with each other?

Meg: So for policies that relate to other policies. An idea that I have is where these policies are linked, I would create, my thought would be to create either like a footnote or even in an internal document that crosswalks them, saying, okay, this policy on adolescent services, policy A on adolescent service relates to policy B on adolescent's services, so that when one is updated, you have... A record or a nudge telling you go back and look at these other, this other policy as well because you're going to need to crosswalk them and make sure that updates to one are reflected in updates to the other. So it almost creates, you create almost, I can envision a spreadsheet that functions that way where related policies like in column A is the name of the policy, adolescent, you know, services policy A, and in column B all of the other policies that touch on adolescent services and may be related.

Cora: And I can add to that too, Meg, if you don't mind. So something we've done with our policies is we have a resources section on the bottom which we have links to federal guidelines and regulations, but also, we also bring, recognize the other policies within our manual that also pertain to that specific policy. So there might be two or three additional policies. And so we keep that kind of running on the bottom as well. So that reminds us that when we make a change to that one, we may have to make a chance to these other two policies as well, so very similar. It's just we do it within the policy, so.

Bemi: Thank you both. One of the earlier questions, I'm scrolling here, was: "Is there recommended frequency for updating existing policies?"

Cora: I think I would say annually, just like I did before, I think that has worked out well. Again, there may be times when you have to update certain policies more frequently, if there's any type of a law change or something like that, but typically we cover them all on an annual basis.

Bemi: Thanks, Cora. One of the questions that we actually got in our PLG is also coming up here. So, Alitha asks, if anyone is how people are leveraging AI in healthcare, what are your thoughts on the use of AI in developing these policies and procedures and or for monitoring the landscape to see when policy updates may be needed, such as changes in best practices, as opposed to changes in Title X guidance, or which sites were made aware of set changes? Um... Is there anyone in the group today that is using AI to either write their policies or monitor their policies? Caitlin says she does frequently. Meg or Cora, do you have anything? I'm seeing a lot of folks are using AI.

Meg: Well, I can say this and this can reflect this reflects back on a question asked earlier, do we have a template policy of policies and we don't yet, RHNTC doesn't yet, but it's definitely on our radar. We think it would be valuable, but Someone from the PLG that we have been talking about reached out to me and asked me the same question and we didn't have that yet. Maybe, maybe hopefully in the future. But what I did do was I, um, good, bad, right, wrong. I don't know how we feel about this, you know, with this use of AI, but I pasted in the, um, components of a policy. And I said, you know, chat GPT, please provide for me a template policy on how to write a policy using the, using this structure of, of bullet points. And it provided me with a good place to start. Um, then, you know, I, I modified it. I tweaked it. I looked at what I would want to do differently, but it gave me a really good starting point. But, you know, yeah, disclaimer is AI can be wrong, and I am sure we all have definitely found just factual errors. So when you are looking at, for example, the Title X expectations and you're crafting policies that need to be compliant with the Title X expectations, make sure you crosswalk anything that ChatGPT gives you or any other AI platform. Make sure you crosswalk it and check it against the actual expectations for accuracy.

Bemi: Thanks, Meg, and thanks for all the responses in the chat. Okay, we have time for maybe two more questions. One of these is by Jennifer: "We're okay with modifying previous policies but struggle with constructing brand new ones. Are there any tips?" And she did give an example of starting a hep C rapid testing, but they're stuck because they have never had this available and have never written a policy on that before.

Cora: Honestly, I'll say I haven't had to construct any new policies recently. But if I did, I honestly would reach out to the network and see what's available out there. There's a lot of states that have their policies available online. I have mine online. And you know, we're all doing the same work, I feel use what you know works for you. And don't reinvent the wheel, because a lot of that already exists out there. So be in touch with your network for sure.

Meg: Yeah, a good Google search, a lot of departments of health, because if states use state or federal dollars, for example, to develop their policies, they will put their policies online. So you can often do a good thorough Google search and find what you're looking for.

Bemi: Okay, we'll do one more. There was a question here on, let me find it... Are there... Is there a data bank with sample policies? And it says here, not templates, but fully written policies that sites can download and amend for their setting?

Cora: Yeah, I think it goes back to kind of what Meg talked about already too, right? There's a lot of policy manuals online if you do a Google search. Um, and so you do have access to other ones that you could potentially pull from and then just tweak them to make them your own for sure.

Meg: You know, in the PLG we shared, we did this Google search and we found some collections of policies that we could include in the post-session email.

Bemi: Okay, Cora, were you going to add something else?

Cora: Yeah, sorry go ahead. You know the question came up earlier too about if we have a policy on the framework or the policy on policies, and so that was something that was shared during the PLG as well that I did share. So you can go ahead and share that as well if you guys would like with the with the group so they could use my template that I have.

Bemi: Thank you, Cora, and thank you everyone for your questions. If we didn't get to your question, we will try to respond to them in the follow-up email. But thank you all so much for asking us all those really, really great questions.

Bemi: Okay, so we would just like to remind you all to stay connected and informed by subscribing to our e-newsletter for all the latest updates, resources, and events that can be delivered straight to your inbox. You can also visit the website, rhntc.org, to explore tools, trainings, and helpful guidance at any time. Also, don't forget to follow our LinkedIn page for upcoming events, webinars like these, highlights, and any other updates from the RHNTC.

Bemi: Thank you so much for your time today. We have put the link to the evaluation in the chat. Please fill out the evaluation. And thank you all so much. I hope you have a great rest of your afternoon.