



NATIONAL ASSOCIATION OF  
Community Health Centers®

# HEALTH CENTER PROFESSIONAL DEVELOPMENT PROGRAM

CARE MANAGEMENT LEADING (103)  
TRAINING, POWERED BY



SESSION 3  
SEPTEMBER 27, 2023  
3:00 PM ET



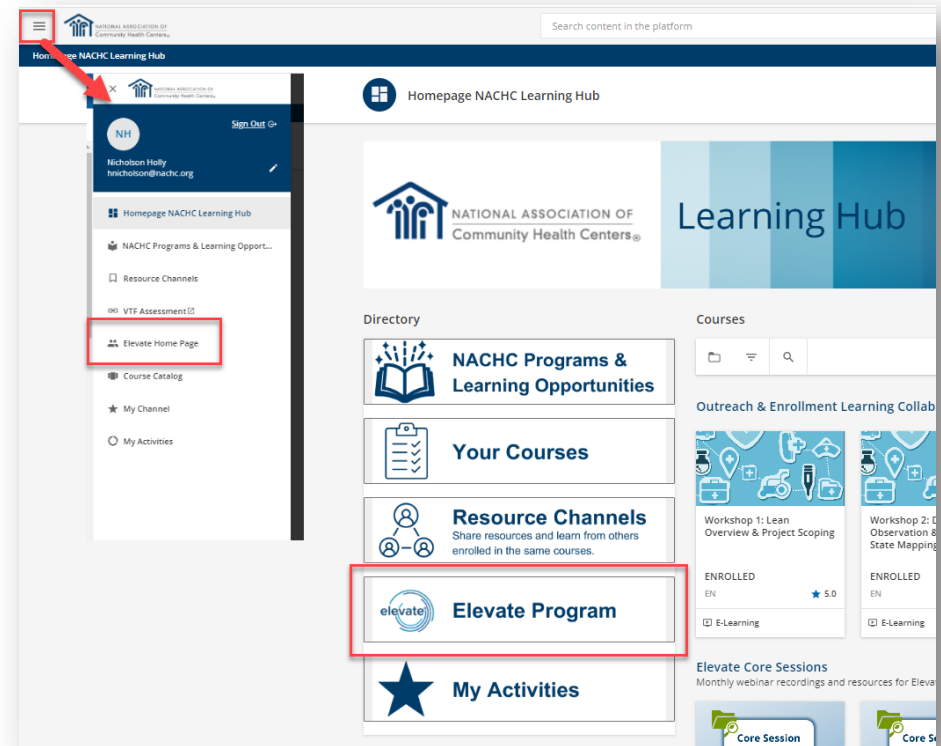
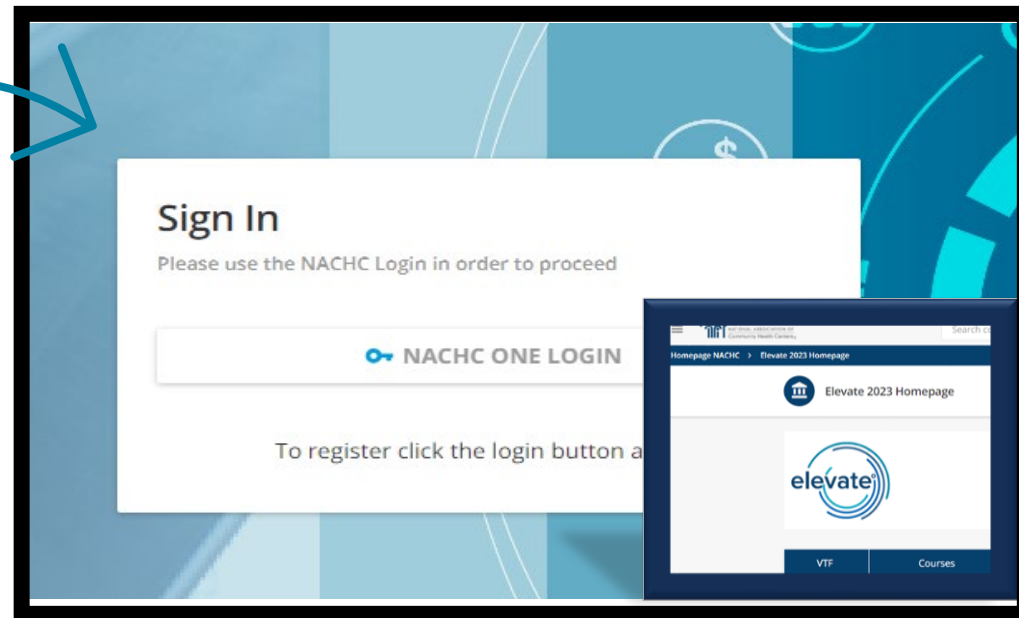


# NACHC's Online Learning Hub

Session will be recorded and available in the Learning Hub

If you already have a 'NACHC One' login  
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use this to sign in.

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# Care Management (103) Leading Session 3



# Session #2 Recap

- Value of a data-informed population approach
- **Care Management GOALS** is a key foundational component to achieving and validating success for your CM team
- **Defining Roles & Responsibilities** for the team – helps align priorities with measures of success (CM goals)
  - Roles – Job Descriptions
  - Responsibilities – Workflows – 3 versions for frequently performed tasks
    - 1 detailed (include EHR screenshots)
    - 1 checklist version
    - 1 visual – diagram workflow
- Consider 3-5 measures of success:
  - 2-3 that are across system and/or clinic
  - 1 for CM team
  - 1 for individual Care Manager
  - Consider Process & Outcome

What  
have  
you  
learned?

# Activity Review

## IDENTIFY AVAILABLE DATA

- Key data contact – data person; curious person; PM vs clinical/quality
- What did you learn
- Any surprises





# Course 2

## Program and Role Development Part II

# Module 3

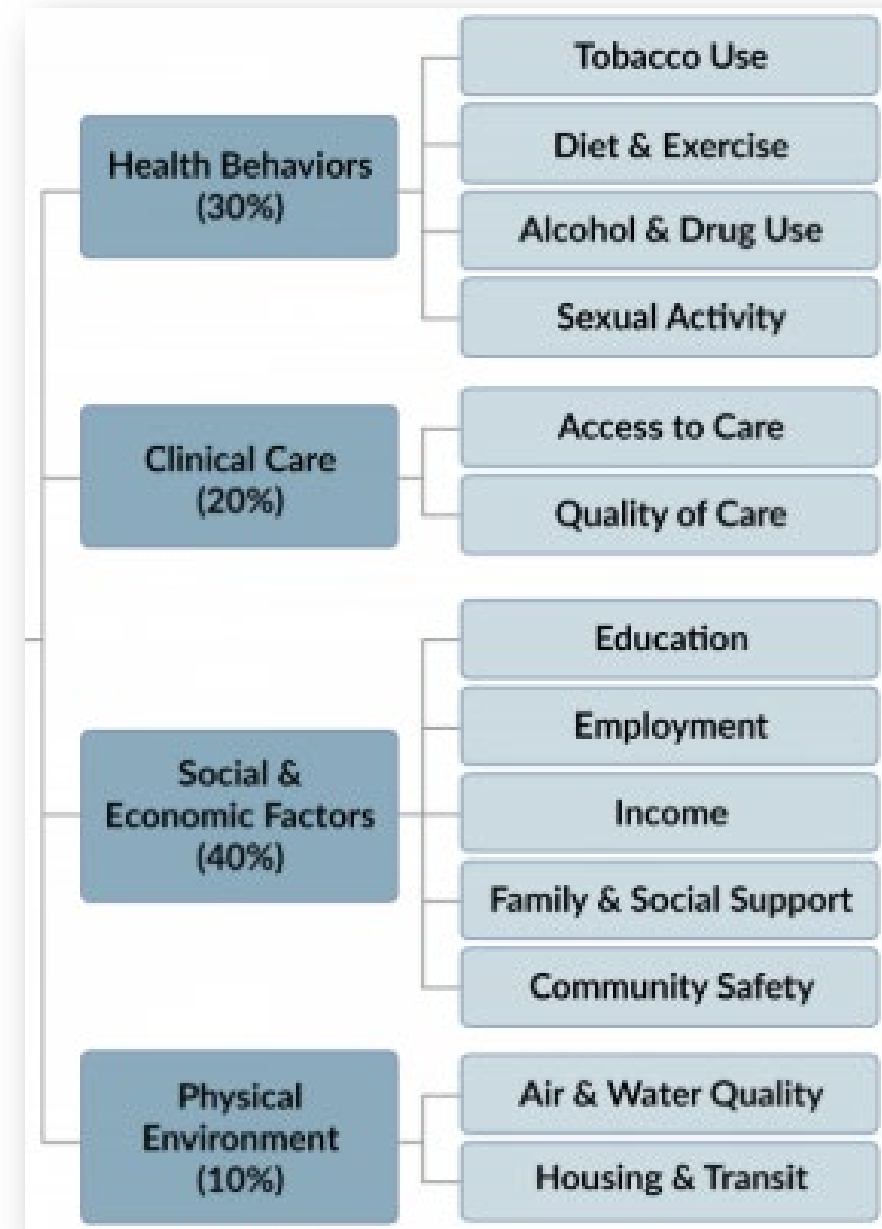
## Communicating the Importance of Addressing Social Needs

# Objectives

- Discuss the impact of social needs on health/clinical outcomes
- Recognize how Maslow's Hierarchy of Needs plays a crucial role in understanding patient's needs
- Identify strategies to demonstrate the ROI for addressing social determinants of health



- **20%** of health outcomes are influenced by clinical care
- **80%** are related to factors that take place outside of the clinic

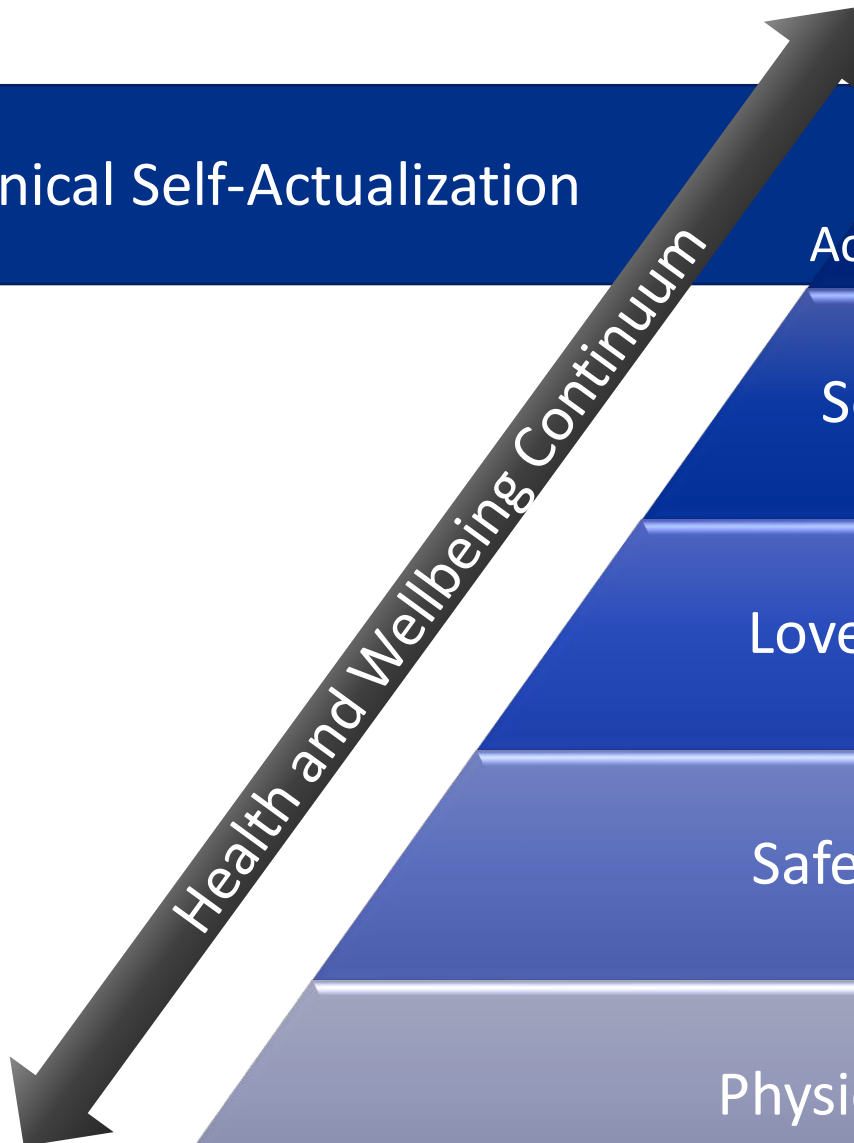


*RWJF County Health Rankings model*





# Clinical Self-Actualization



Self-Actualization

- Morality, creativity, spontaneity, acceptance, experience purpose, meaning and inner potential

Self Esteem

- Confidence, achievement, respect of others, the need to be a unique individual

Love & Belonging

- Friendship, family, intimacy, sense of connection

Safety & Security

- Health, employment, property, family & social stability

Physiological Needs

- Breathing, food, water, shelter, clothing, sleep



# Case Examples



Single mom

Works 2 minimum wage jobs

Received eviction notice (failure to pay rent)

Youngest child has Cystic Fibrosis; unable to afford medications



Man, age 42, just divorced

Lost his home & health insurance d/t divorce

Experiencing chest pain, but unwilling to go to the ED



Successful business woman

Mugged in parking garage while leaving work last week

Experiencing severe PTSD & anxiety

Will not leave her house – thus, can't get to office visit for evaluation & treatment

# Case Examples *(continued)*



Young child  
Severe asthma  
Family lives in subsidized housing with pest infestation  
Repeat ED & inpatient admissions for asthma exacerbations

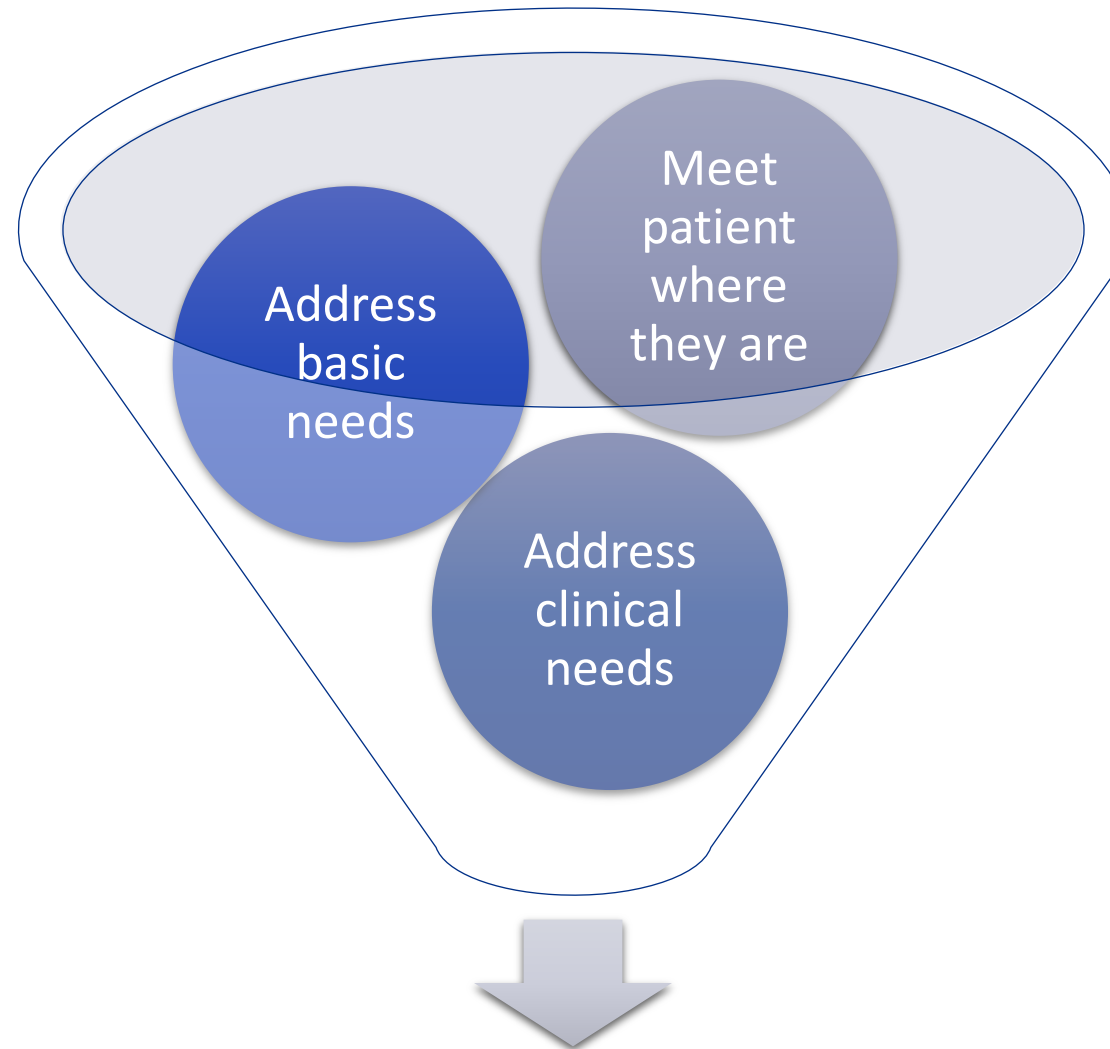


Grandparent  
Living on fixed income  
Has custody of grandchildren  
Multiple chronic conditions  
Cannot afford high monthly out of pocket cost for medications



Family that lives in suburbs  
Car needs repair and can't be driven; family can't afford the repairs  
Mom recently diagnosed with osteomyelitis – needs daily IV antibiotics at infusion center *(insurance won't pay for home care)*

# The Value of Addressing SDoH



Clinical Self Actualization + Financial ROI

# Small Group Discussion – Social Needs Data

Time: 10 minutes

Lead: Identify 1 person to take notes and report out to larger group

## **TOPICS – pick 1 to discuss or work thru all**

- Does your current CM team prioritize Social Needs screening/support?
- What works or does not work for your Social Needs screening/support process?
- What process of accountability exists for your CM team and Social Needs screening/support?





LET'S TALK



## Questions and Discussion



# Course 3

## Building Your Team

# Module 1

## Developing Skills for Ambulatory Care Management Roles



# Objectives

- Identify the basic clinical and professional skills every Care Manager must have.
- Defend the advanced skills and competencies that contribute to the Care Manager's success as a practice leader.
- Produce a list of key character traits that are critical for success in the Care Manager role.





Are you looking for this?



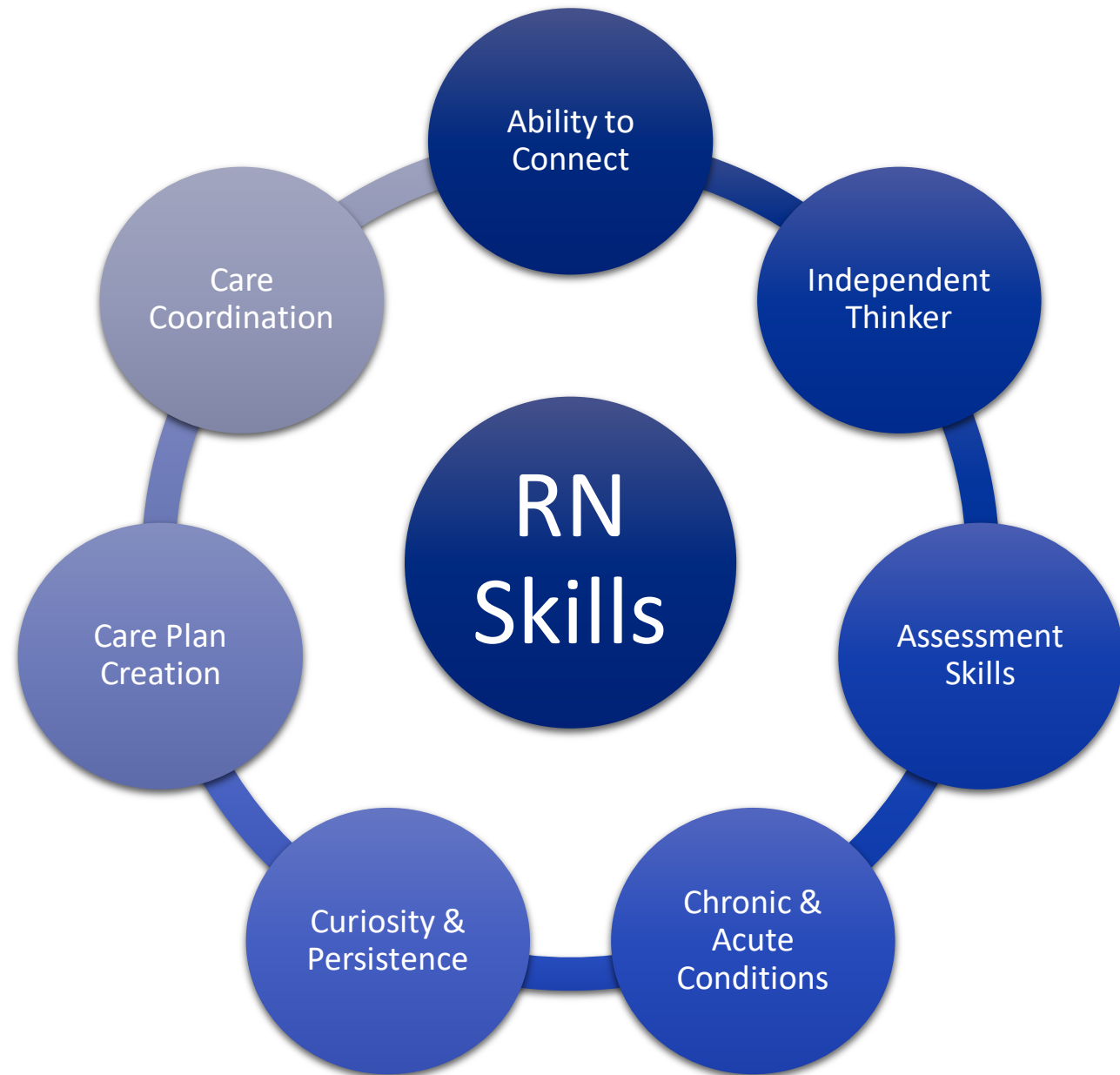
OR THIS?



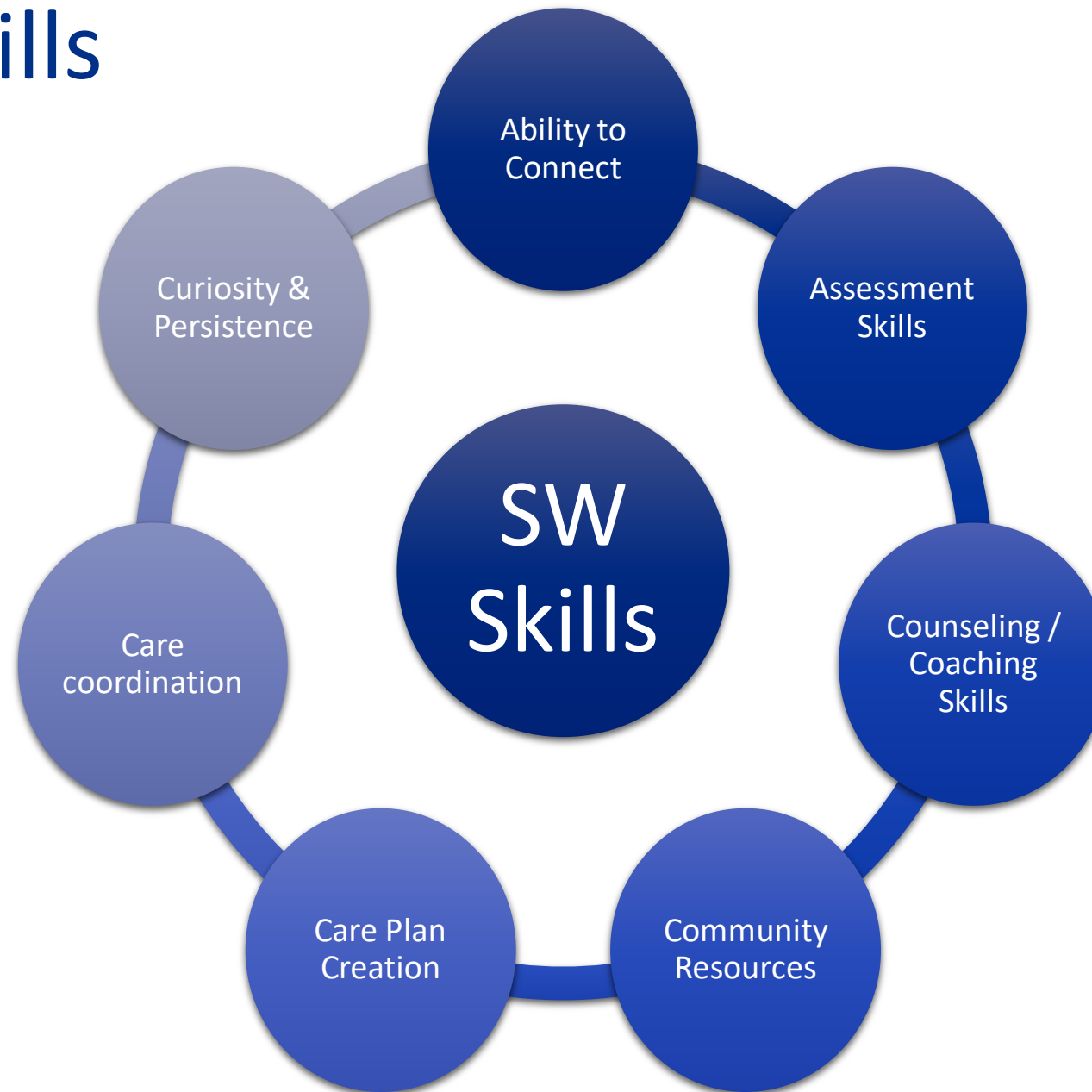
# RN Skills Needed

## Ideal Work Experience:

- Acute care (min 2 years)
- PLUS one of the following:
  - Home Care
  - Critical care areas
  - Inpatient Care Management



# Social Worker Skills



# CHW Skills Needed



# Other Inter-Personal & Professional Skills

Emotional intelligence

Effective communication  
(written & verbal)

Documentation

Time management & efficiency

Adaptive to change

Team player

Problem solving

Computer skills

Proficiency in Microsoft office suite products

Motivational Interviewing

Teach Back™



# Key Character Traits

- Ability to connect
- Independence
- Assertiveness
- Self-confidence
- Unafraid to challenge the status quo – in a compassionate way
- Innovative/Creative
- Persistence
- Positivity
- Curiosity



# Hiring Considerations: Team Culture

*Culture is*

*“the set of shared attitudes, values, goals, and practices that characterizes an institution or organization”*

*-Merriam Webster*



# Activity

- Read each case scenario and answer the questions.
- List any combination of 2-3 interpersonal skills, professional skills, or character traits that are a top priority in hiring for the CM role.
- Explain why each of the 3 you selected is important.





# Activity #2

- For this activity, you will create a list of the core skills you believe are necessary for a new hire in the CM role. Be sure to indicate whether this will be an RN, Social Worker, Community Health Worker, or another role.
- Document the skills required (must-have).
- Document the 'nice to have' skills – these are the skills that a candidate isn't required to have, and for which you are willing to train during the orientation period or beyond.
- If your organization has organizational values and competencies for this, don't forget to include these items on the list.
- Please put sincere thought into this, as the activity in the next course will build upon this work! And, ultimately at the end of this Learning Path, you will have a working process that you can implement in your practice for hiring CM's.



LET'S TALK



## Questions and Discussion

# Course 3

## Building Your Team

# Module 2

## Assessing for Skills During the Interview Process



# Objectives

- Describe value of testing for skills during an interview for a Care Manager.
- Propose strategies for testing Care Manager interviewees.
- Distinguish methods for a multi-step interviewing process.



# Topics for Discussion

- Discuss behavioral based interviewing and why it is important when determining the right person for the role of Care Manager.
- Produce examples of behavioral based interviewing questions that are helpful when interviewing Care Managers.





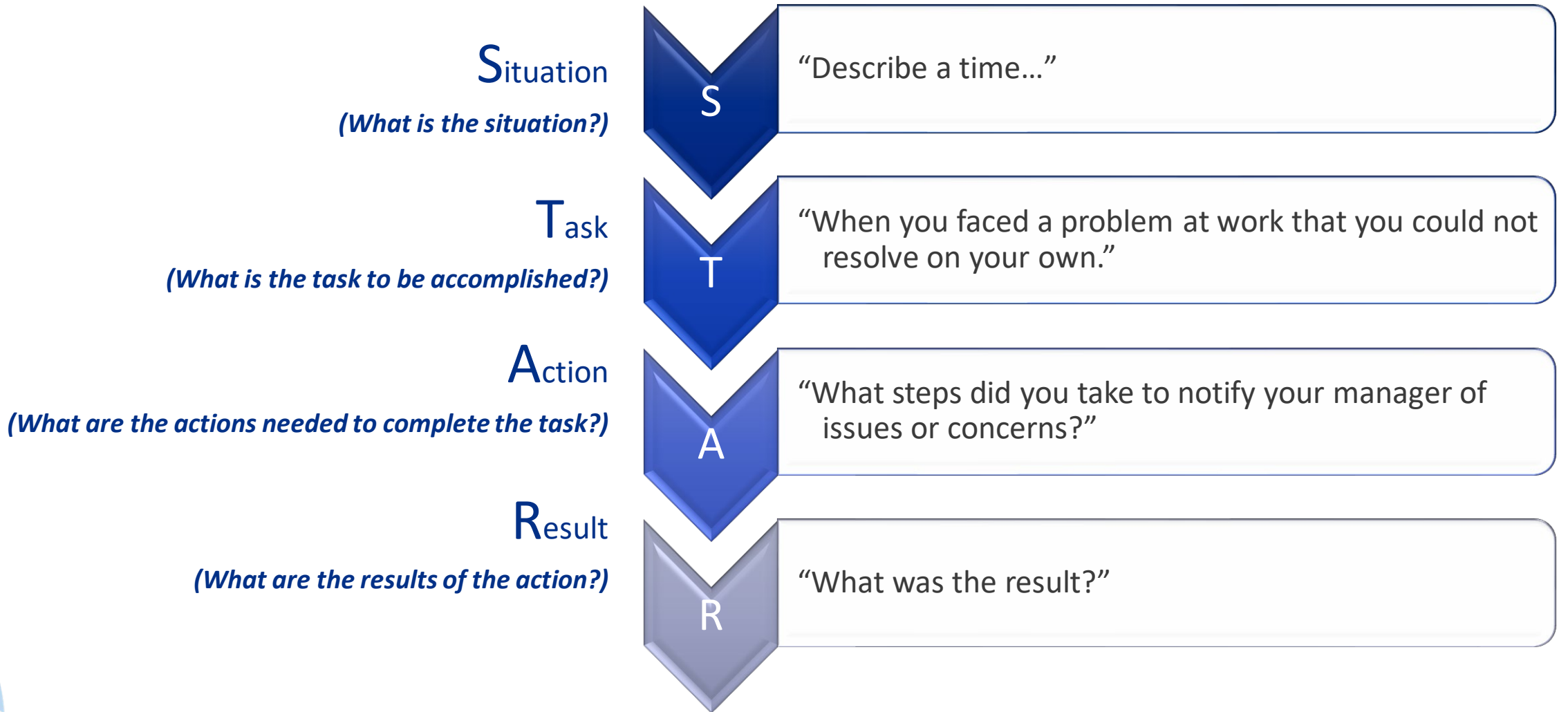
Behavioral interviewing focuses on a candidate's past experiences by asking candidates to provide specific examples of how they have demonstrated certain behaviors, knowledge, skills and abilities. Answers to behavioral interview questions should provide verifiable, concrete evidence as to how a candidate has dealt with issues in the past.



*Society for Human Resources, 2016*



# Creating Behavioral Interview Questions



# Questions about Teamwork

- Describe the specific behaviors you use to create an environment of cooperation and collaboration. Provide an example of how you have used these behaviors in the past, and how it turned out.
- Describe a situation in which you and a co-worker did not get along. Tell me about that situation and how it worked out.
- Tell me about a time when you recognized a co-worker doing a really great job. What was the situation and how did you let the person know that you appreciated their work?
- Describe the type of teamwork you have experienced in your last 1 or 2 jobs. What was that teamwork like for you? Is there anything that you would do differently?





# Questions about Ability to Innovate

- Describe your most successful accomplishment at work so far and the steps you had to take to get there. What was the result of this work?
- Give me an example of when you tried to accomplish something and failed. What did you learn and what would you do differently?
- Tell me about a time you had to convince your co-workers or manager to do something differently. How did you go about getting that done? What were the results?
- Describe a time when you anticipated the future and made changes to something in your work in order to meet the anticipated future needs. How did you go about doing this and what was the result?



# Questions about Ability to Communicate Effectively

- Describe a time when you realized you had to change how you communicated with a staff member or manager. How did you deal with the situation, and what was the result?
- Tell me about a time when you had to communicate sensitive information. How did you handle the situation, and how did it turn out?
- Tell me about a time when you had to talk with an angry patient or family member. What steps did you take to handle the situation? What was the result?
- Describe a time when you received criticism at work. How did it make you feel, and how did you respond?



# Questions about Integrity

- What work-related situations have caused you the greatest frustration, and how did you deal with them?
- Tell me about a time when you went above and beyond the call of duty. What happened and what was the outcome?
- Tell me about a time when you were asked to complete a difficult assignment even though the odds were against you. What did you learn from that experience?
- Tell me about a time when you were considered the “leader in charge”. What did you do to ensure that the group you led worked as a team and communicated well?
  - How did you recognize and reward top performers?
  - How did your team perceive you?



# Rating Scale

## Simple Scale

- Uses 2 ratings
- Satisfactory & Unsatisfactory

## Likert Scale: Generic Scoring

- Allows comparison of candidates
- Generic score for questions, does not give specific behaviors needed

## Likert Scale: BARS Scoring

- Enables even greater comparison
- Focus on the specific behaviors required

# Conducting a Behavioral Interview

Establish rapport

Describe what to expect

Describe job & requirements

Ask interview questions

Explain next steps



# Red Flags During an Interview



- Short answers that generalize behavior
- Negativity, criticism, & accusations
- Unable to recall a situation
- Answers that indicate defensiveness
- Unable to describe emotions, responses to situations
- Unable to manage the pressure of the interview

# Final Thoughts on Interviewing

Determine  
which skills  
are must have

Determine  
which skills  
are “ideal,”  
but for which  
you’re willing  
to train

Consider  
incorporating  
peer  
interviews

Trust Your  
Gut!



# Value of Testing For Skills

Screen out candidates  
that aren't serious

Quickly identify those  
that demonstrate skill  
and ability for this work





# Testing Strategies

## On the Spot

- Case study
- Data Interpretation
- Managing a Registry
- Role play

## Pre-Work/Homework

- Create tracking log for chronic disease management
- Develop educational PowerPoint



# Skills Testing Example: Care Planning Case Study

## Purpose of this exercise:

To assess the candidate's critical thinking skills, ability to meet patients where they are, understanding of strengths-based coaching, and skill with using open-ended questions.

## Instructions for Activity:

1. Provide a copy of a case scenario and questions for the candidate to answer about the scenario (we have provided an example to use, or make up your own).
2. Let the candidate know they will have 20 minutes to read the scenario and answer the questions (or allow for more/less time, as you deem appropriate).
3. Some of the candidates may not have experience with personalized care planning with patients, especially if they haven't worked as a Care Manager. If this is the case, understand that their responses to the questions will be more rudimentary – however, you still want to see a high level of processing, and an ability to.

# Skills Testing Example: Data Interpretation

## Purpose of this exercise:

To assess the candidate's ability to collect multiple pieces of data, and critically think through which patients might benefit from a care management intervention and why other patients might not benefit.

## Instructions for Activity:

1. Share an example of the risk stratification algorithm used at your practice.
2. Pull together a list of 10-15 (deidentified) patients with risk scores and several key clinical data points (diagnoses, psychosocial factors, lab results). *Be sure to include a variety of patients with different risk levels and clinical/psychosocial factors.*
3. Have the candidate talk through which patients they would consider enrolling in care management and why.



# Skills Testing Example: Teach Back Role Play

## Purpose of Exercise:

Skill in this area is critical to working with patients and helping them progress toward goals for self-management. The Care Manager should be able to provide education in a way that patients understand, as well as use skillful techniques to assess patient's comprehension of the information.

## Instructions for Activity:

1. Instruct the candidate to select any medical/clinical concept of their choice.
2. Instruct the candidate to select one of the interviewing panelists, and then provide education to this panelist by using the 'Teach Back' method.
3. The goal is to ensure that the 'patient' understands the information.



# Skills Testing Example: Managing to a Protocol

## Purpose of Exercise:

To assess the candidate's ability to collect multiple pieces of data, integrate the information, and critically think through how to apply a chronic disease protocol to each unique patient.

## Instructions for Activity:

Share a copy of your practice's protocol for diabetes management.

Pull together a list of 5-10 (deidentified) patients from the diabetes registry. Include this information:

- Risk stratification score
- Most recent Hgb A1c and date completed
- Recency of DM education with a dietitian or DM educator
- Other pertinent factors

Have the candidate talk through a very basic plan for each patient, based upon your protocol for diabetes management.



# Key Steps in a Skills-Based Interview

Establish rapport

Describe what to expect during interview

Conduct interview questions & activities

Explain next steps

# Final Considerations for Skills Based Interviews

- Plan ahead – give yourself plenty of time to develop the interview process and the skills ‘questions’ that the candidates will have to complete.
- Identify key skills in the role and develop testing around these skills.
- Check with your organization’s Human Resources Department to see if approval is required for the interview questions and skills testing.
- Be selective with the activities– and don’t overwhelm the candidates with too many ‘tests’!
- Don’t seek perfection in a candidate – seek skill, aptitude, and attitude!





LET'S TALK



## Questions and Discussion



# Key Takeaways



Social Needs Screening/Addressing Needs is key to a population approach



Building effective Care Management teams starts with effective hiring & skill assessment



Skill development is an ongoing process for Care Management teams

# Session #4

## Course 4. Supporting Care Team Integration, Part I October 4, 3 – 5 PM ET

### Module 1. Introducing the Role of Care Manager to the Care Team

- Identify care management value statements that resonate with care team members
- Discuss quality goals and how Care Managers can impact these.
- Discuss key considerations for workflow and communication processes to review with the care team.
- Develop a plan for communicating the purpose of the Care Manager role to the care team.

### Module 2. Finding/Developing a Champion for Care Management

- Describe the value of having a provider champion in a practice.
- Define key characteristics necessary to the role of provider champion.
- Develop strategies for successfully engaging a provider champion.



# Connect With Us

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**Angie Schindler-Berg**

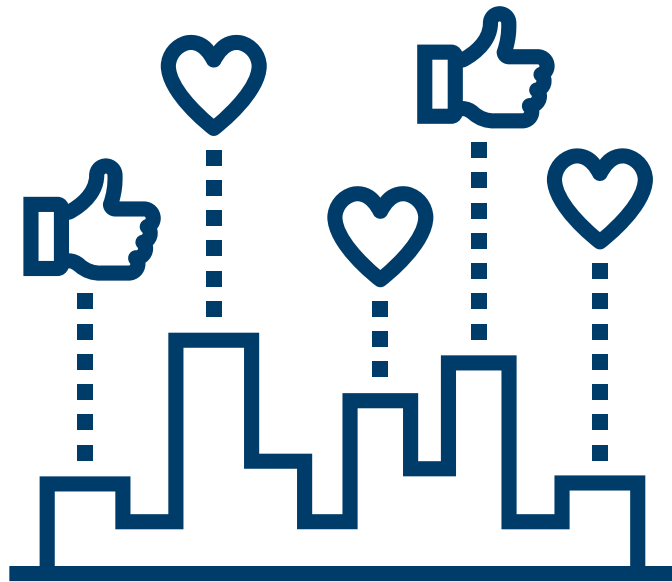
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# Provide Us Feedback



# Contact Us!

## The NACHC Quality Center team is here to help!

Questions on how to access online content? VTF Assessment?

Contact [QualityCenter@NACHC.org](mailto:QualityCenter@NACHC.org)



**THANK YOU!**

