NATIONAL ASSOCIATION OF
Community Health Centers ®

HEALTH CENTER PROFESSIONAL DEVELOPMENT PROGRAM

CARE MANAGEMENT (103) LEADING TRAINING, POWERED BY

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SESSION #4
OCTOBER 4, 2023
3 PM ET

Care Management (103) Leading Session 4

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Session 3 Recap

- Importance of Addressing Social Needs – expanding the picture of the population in Care Management

- Understanding Maslow's Hierarchy of Needs and how it impacts an individual's ability to address the obstacles to optimal health

- Discussed basic professional and/or clinical skills that support effective care manager roles

- Review of behavioral interviewing questions and skill assessment in the interview process

Course 3
Building Your Team

Module 3
Effective Professional and Skill Development for Care Managers

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Objectives

- Define opportunities to support Care Manager professional and skill development.

- Develop a method for supporting Care Manager success that adheres to practice policies and procedures.

Professional & Skill Development Opportunities

- **Building Skill Strengths**
  - Ongoing skill development
  - Recognize skills: Engage to lead a CM team training
  - Recognize best practices: Engage to lead a workflow development or update

- **Recognizing opportunities for improvement**
  - Struggles with workload
  - Struggles with measures of success
  - Inconsistent documentation
  - Primary team feedback
  - Patient feedback

Building CM Skill Strengths

- Ongoing Skill Development
  - Dedicate time for skill development
  - Job shadowing
  - Peer to peer sharing
  - Case study reviews
  - Care conferencing
  - Formal skill training – learning collaboratives

Sharing Best Practices

- Data-informed best practices
  - ED use reduction by site/clinic
  - Quality measure improvement by CM population or Care Manager population
  - Post-discharge outreach completion (TCM) by location /team/Care Manager
- Drill in to understand the best practice
  - Observation
  - Documented workflow
  - Identify any key skills that contribute to best practice
  - Validate key contributors – risk score

Sharing Best Practices (*continued*)

- Engage CM to lead peer-to-peer review of best practice

- Identify variations

- Peer review process to engage the team

- Update or develop workflow or resource that reflects best practice

Breakout Group Discussion

Break out Group: 10 min

Identify a leader: Take notes/report back

- ✓ What has contributed to retention or turnover with your Care Management team?

- ✓ How has focusing on professional growth/ CM skills / effective support contributed to retention or turnover?

- ✓ Share an example of how CM skill development is promoted at your clinic/system.

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CM Team Retention/Turnover/ Building Skill Strengths Discussion

Small Group Breakouts

✓ What has contributed to retention or turnover with your Care Management team?

✓ How has focusing on professional growth/ CM skills / effective support contributed to retention or turnover?

✓ Share an example of how CM skill development is promoted at your clinic/system.

Burnout: Recognizing the Risk

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The Impact of Burnout on Patients

- Poorer Health & Engagement
- Increased Errors
- Increased Safety Events
- Decreased Quality
- Increased Overall Cost

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Recognizing Burnout in the Care Team

De-personalization

Depression, Fatigue

Appetite Changes

Job Dissatisfaction

Decreased Quality of Life

Reduced Productivity

Turnover

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Assessing Burnout

Mini Z survey (inclusive)

For questions 1-10, please indicate the best answer. [Note: do not include scoring in administration of survey]

1. Overall, I am satisfied with my current job.   [Scoring: Responses 1-2 = satisfied]

1-Agree strongly   2-Agree   3-Neither agree nor disagree   4-Disagree   5-Strongly disagree

2. I feel a great deal of stress because of my job. [Scoring: Responses 1-2 = high stress]

1-Agree strongly   2-Agree   3-Neither agree nor disagree   4-Disagree   5-Strongly disagree

3. Using your own definition of "burnout", please circle one of the answers below: [Scoring: responses 3-5 = burnout]

1. I enjoy my work. I have no symptoms of burnout.
2. I am under stress, and don't always have as much energy as I did, but I don't feel burned out.
3. I am definitely burning out and have one or more symptoms of burnout, e.g. emotional exhaustion.
4. The symptoms of burnout that I'm experiencing won't go away. I think about work frustrations a lot.
5. I feel completely burned out. I am at the point where I may need to seek help.

4. My control over my workload is: [Scoring: Responses 3-5 = satisfactory control]

1 – Poor   2 – Marginal   3 – Satisfactory   4 – Good   5 – Optimal

5. Sufficiency of time for completing my work is: [Scoring: Responses 3-5 = satisfactory time to complete work]

1 – Poor   2 – Marginal   3 – Satisfactory   4 – Good   5 – Optimal

6. Which number best describes the atmosphere in your primary work area? [Scoring: Responses 4-5 = chaos]

Calm   Busy, but reasonable   Hectic, chaotic
1   2   3   4   5

7. My professional values are well aligned with those of my direct leaders: [Scoring: Responses 1-2 = high values alignment]

1-Agree strongly   2-Agree   3-Neither agree nor disagree   4-Disagree   5-Strongly disagree

8. The degree to which my team works efficiently together is: [Scoring: Responses 3-5 = good teamwork]

1 – Poor   2 – Marginal   3 – Satisfactory   4 – Good   5 – Optimal

9. The amount of time I spend on work at home is: [Scoring: Responses 1-2 = too much work at home]

1 – Excessive   2 – Moderately high   3 – Satisfactory   4 – Modest   5 – Minimal/none

10. My work day is mainly frustrating: [Scoring: Responses 3-5 = not frustrated with work day]

1=Agree strongly   2=Agree   3=Neither agree nor disagree   4=Disagree   5=Strongly disagree

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Recognizing when Opportunities for Improvement Exist or Develop

Lack of basic skills

Lack of role definition

Ineffective orientation

Lack of effective workflow

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Data Sources to Identify Where Improvement Is Indicated

Quantitative Data

- Job duties
- Program & performance metrics
- Call logs
- Outreach encounters
- Documentation

Qualitative data

- Feedback from providers and care team members
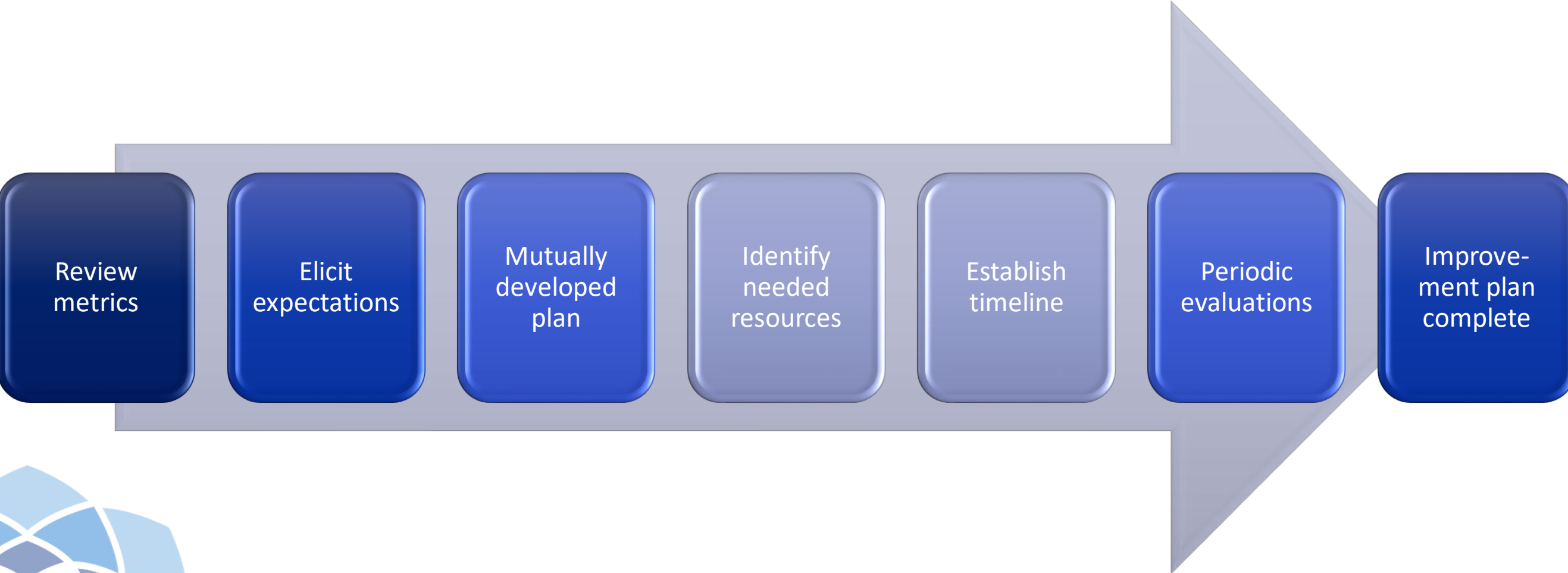- Feedback from patients & caregivers

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Skill Improvements Options

- Peer to peer coaching/mentoring

- Online courses on specific topics (MI, Teach Back)

- Independent coaching support

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Tactics to Create a CM Skills Improvement Plan

Review metrics → Elicit expectations → Mutually developed plan → Identify needed resources → Establish timeline → Periodic evaluations → Improvement plan complete

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Skills Improvement Plan Example

Measure of success: 95% of all hospital discharges receive an outreach within 2 business days

- Current rate is 75%

- Goal (minimum) is 95%; to be achieved by *(date)* and maintained thereafter

- Resources:
    - Improved process or assistance with integrating discharge list
    - Accurate patient contact information

- Plan:
    - Achieve rate of 80% by end of 1st 30 days *(date)*
    - Achieve rate of 90% by end of 60 days *(date)*
    - Achieve rate of 95% by end of 90 days *(date)*
    - *Maintain rate of 95% thereafter*

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Skills Improvement Plan Example *(continued)*

The Care Manager will be paired with the senior lead in the CM department for remediation in the following areas:

- Hospital discharge reports

- Prioritization of patients for outreach

- Components of outreach call

- Documentation

Manager will assign remedial education, meet with CM monthly to review performance milestones and individual performance, and follow HR procedure if performance is not to par.

Disciplinary Action Plan

- Failure to meet any of the milestones will result in termination

- Failure to maintain the rate of 95% will result in termination

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Group Skills Improvement Discussion

Share an example of when a skill improvement need was evident for a team member.

How was this identified?

How did you address this need?

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Questions and Discussion

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Course 4

Supporting Care Team Integration, Part 1

Module 1

Introducing the Role of Care Manager to the Care Team

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Objectives

- 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.
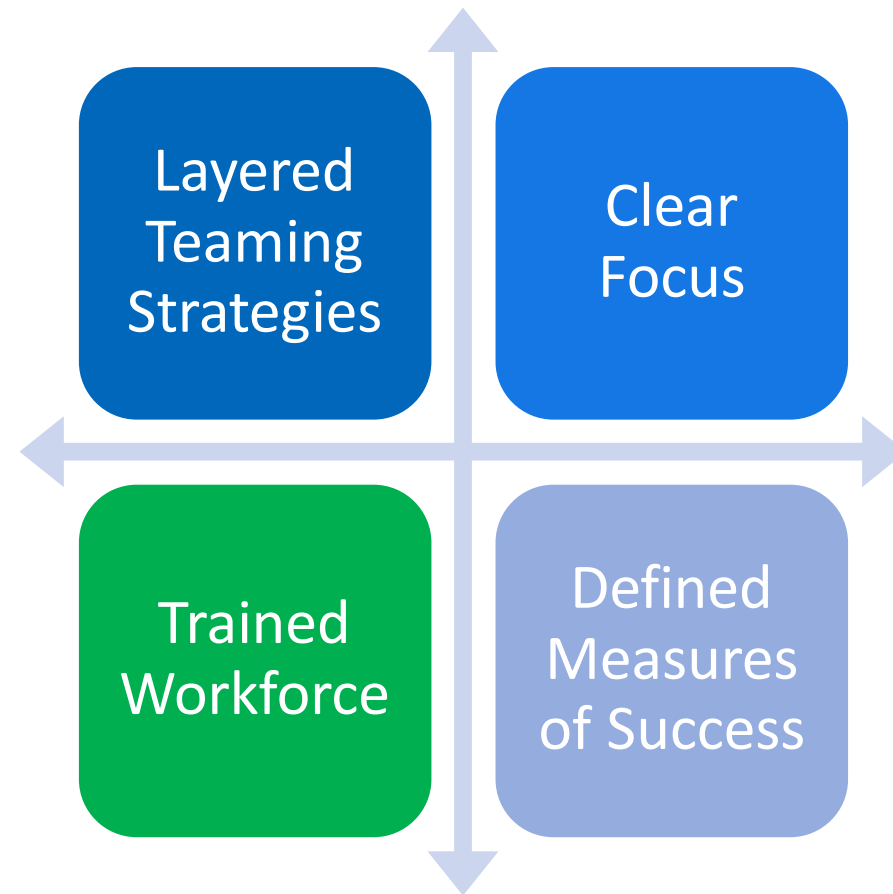
" Not all projects succeed. On average, two in five projects do not meet their original goals and business intent, and one half of those unsuccessful projects are related to ineffective communications. "

Project Management Institute, 2013

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Developing a Communication Plan

Tailor communication for each stakeholder type

Align message with the WHY, consider a value statement for each stakeholder

Start early, over-communicate, & use a "spaced repetition" strategy

Accommodate different learning styles

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Strategy #1:
Tailor Communications for Stakeholder Types

Executive leaders	Human resources	Practice care team	Billing dept
IT	Facilities	Data & Business Intelligence	Patients

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Strategy #2:
Start Early, Over-Communicate, and Use Spaced Repetition

Start Early

Over-Communicate

Spaced Repetition

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Strategy #3:
Accommodate Different Learning Styles

| Visual | Use pictures, graphs, charts, diagrams |
Auditory	Use lecture, discussion, email, phone
Reading/Writing	Use reports, assignments, PowerPoint
Kinesthetic	Use examples, offer experiential learning

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Educating the Practice Care Team

For the existing Care Team:

1. What does each care team role need to understand about the Care Manager's role?

2. How will the addition of a Care Manager impact each role on the care team?

For the Care Manager:

1. What does the Care Manager need to understand about each role in the practice?

2. How will the Care Manager interface with each role on the care team?

Care Team Role Education

CM

Practice Care Team

Care Manager Role Education

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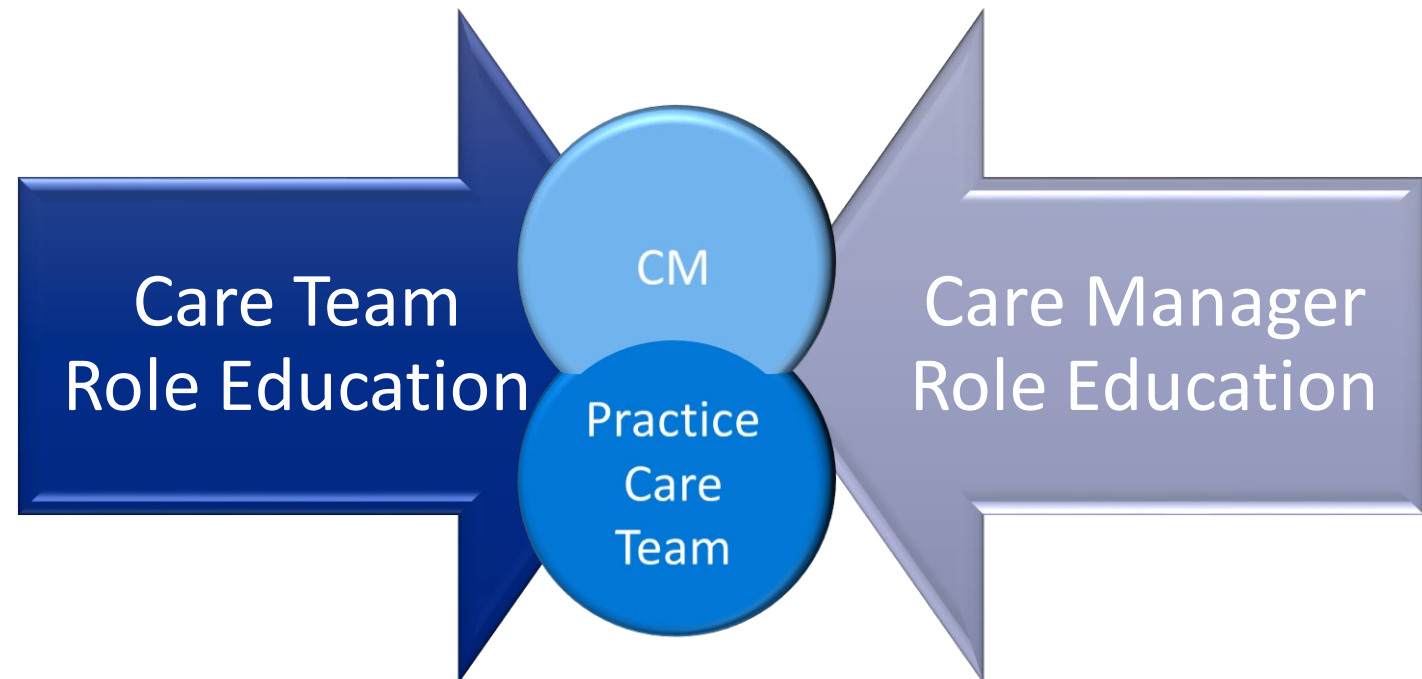
Educating the Practice Care Team *(continued)*

Providers

- CM referral criteria – Risk score – PCP knowledge
- Workflow: CM referrals
- Workflow: communication with CM
- Care conference responsibilities

MA's

- Workflow: who manages urgent concerns for CM pts
- Workflow: pre-authorizations
- Workflow: calls from CM pts
- Workflow for referral to CM (if applicable)?

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Educating the Practice Care Team *(continued)*

Triage Team

- Workflow: routing of calls/messages from patients enrolled in CM
- Workflow: Issues addressed by triage

Front Office

- Scheduling for patients enrolled in CM
- Billing, insurance, & co-pays
- Workflow: In person visits with CM
- Workflow: fielding calls from patients in CM

Group Discussion

Develop a communication strategy for the practice care team regarding the roll out of a new CM role in the practice. Be sure to include:

1. Specific education topics (e.g., what the CM will do, what the CM will **not** do, workflows, where the CM will be located, how to reach the CM, etc.)
2. Different tactics you will use to accommodate learning styles
3. Timeline for the communication (what you will communicate and when)
4. Key pieces of information you want each role in the practice to understand about the CM role and how they will interface

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Questions and Discussion

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Course 4
Supporting Care Team Integration, Part 1

Module 2
Finding/Developing a Champion for Care Management

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Objectives

- 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.

"

Change champions are important for moving new innovations through the phases of initiation, development, and implementation.

Shaw et al, 2012

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Two Champion Types:

1. Organizational
2. Project

Table 1

Distinguishing Features of Project & Organizational Change Champions

Project Champion	Organizational Change Champion
Has or is given authority to drive forward a project-based innovation	Has authority to cultivate an environment for ongoing practice improvement/organization learning
Effectively communicates the purpose and scope of work for the project-based innovation	Has a clear vision for the larger organization, and effectively communicates how the project-based innovation fits into that vision
Time-delimited role as established by the project	Ongoing role
Actively & enthusiastically promotes a project-based innovation	Actively & enthusiastically promotes both the specific project as well as ongoing practice improvement
Mobilizes resources (internal/external) for a project-based innovation	Mobilizes resources (internal/external) for ongoing practice improvement
Navigates the socio-political environment for a project-based innovation	Navigates the socio-political environment for ongoing practice improvement
Provides leadership for a project-based innovation	Provides leadership for ongoing practice improvement

Shaw et al, 2012

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Characteristics of a Successful Champion

Respected by colleagues	High emotional intelligence	Effective communication
Adaptive to change	Problem-solving skills	Team player

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Key Behaviors of a Champion

Promotion of the Care Management program and role

Sowing interest in the project across the organization

Networking to engage support beyond the practice

Savvy negotiation of organizational politics

Management of change and resistance within the team

Inspiring a compelling vision for Care Management

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Helping the Champion Succeed

- Leadership support
- Power in decision making
- Time for administrative duties
- Re-structured or creative approach to compensation

Questions and Discussion

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Session #5

Course 5. Supporting Care Team Integration, Part II
October 11, 3 – 5 PM EST

Module 1. Addressing the Challenges of Care Team Integration
- Develop strategies to ensure successful integration in your practice care team.
- Identify common challenges when integrating care management into the care team.

Module 2.
- Evaluate common scenarios of the implications of the Care Management role being too broad.
- Appraise the available data sources and choose the most appropriate ones that will support this communication.
- Identify key strategies in communicating care management role creep and the impact it has upon ROI in a practice.

Module 3. Monitoring and Mitigating Care Manager Burnout
- Distinguish the impact burnout can have on the Care Manager, care team, and patients
- Identify tools to assess burnout
- Through use of assessment tools, identify common contributors that can alert to current or future Care Manager burnout.
- Develop effective strategies to mitigate Care Manager burnout

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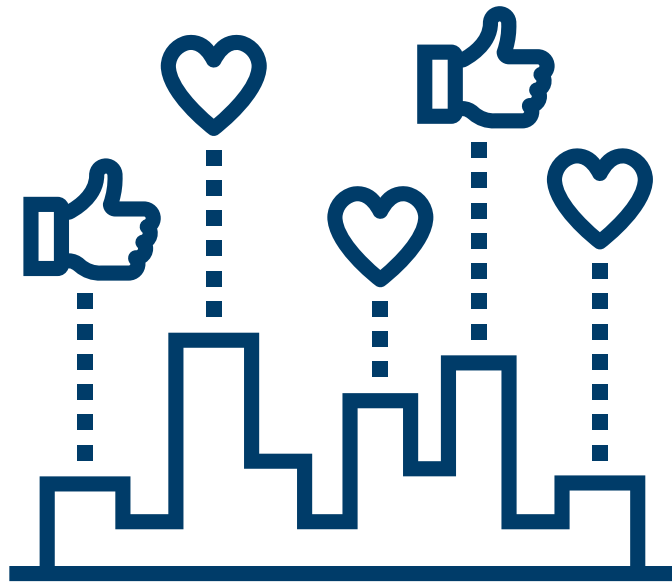
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Questions on how to access online content? VTF Assessment?

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THANK YOU!

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