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A Resource Center for Today's Case Manager

Develop Others: Tools to Develop the Next Generation of Case Managers

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Agenda

- Welcome and Introductions

- Learning Outcomes

- Presentation:
  - **Patricia Benner, R.N., Ph.D., FAAN**
    University of California School of Nursing
  - **Vivian Campagna, MSN, RN-BC, CCM**
    Chief Industry Relations Officer, CCMC
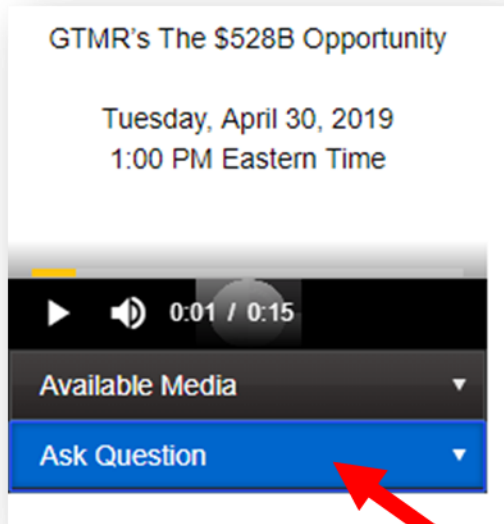 - Question and Answer Session

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Audience Notes

There is no call-in number for today's event. Audio is by streaming only. Please use your computer speakers, or you may prefer to use headphones. There is a troubleshooting guide in the tab to the left of your screen. Please refresh your screen if slides don't appear to advance.

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GTMR's The $528B Opportunity

Tuesday, April 30, 2019
1:00 PM Eastern Time

▶ 🔊 0:01 / 0:15

Available Media ▼

Ask Question ▼

Click here

How to submit a question

To submit a question, click on Ask Question to display the Ask Question box. Type your question in the Ask Question box and submit. We will answer as many questions as time permits.

Audience Notes

- A recording of today's session will be posted within one week to the Commission's website, www.ccmcertification.org

- One CCM continuing education credit for board-certified case managers (CCM) and one ANCC nursing contact hour continuing education credit is available for today's webinar only to those who registered in advance and are participating today.

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Learning Outcomes Overview

After the webinar, participants will be able to:

1. Provide at least three practice-based examples of facilitating the (1) mentee's relational and engagement skills with patients/families; and (2) mentee's interviewing and questioning strategies that facilitate knowledge and understanding of the learning and information needs of patients and families in the mentee's cases.

2. Identify at least five major areas of local practical/practice knowledge needed in your specific "curriculum" for case manager mentees in your particular case management practice.

3. Develop a plan for facilitating teaching and learning of the major domains of learning and practice for mentees in the case manager's particular practice, identifying and articulating (1) major aims, goals and functions of case management in the particular practice; and (2) ways of teaching and guiding experiential learning for areas of practical/practice knowledge in specific patient population of the case manager.

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Getting started with mentorship

New tools and resources to help you mentor and nurture the next generation of case managers.

We're ready to help you. Find resources at www.ccmcertification.org/develop-others/mentoring

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Mentoring resources from CCMC

Develop Others Toolkit

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Mentoring Agreement

This template is designed to help the mentor and mentee mutually agree to parameters and goals for the mentorship. It is designed to be filled out together.

Step 1: MUTUALLY AGREED-UPON GOALS
1. What are the mentee's goals for the mentorship? What do you hope to achieve? (For example, gain knowledge/skills to work in a new setting, achieve CCM certification, gain leadership skills, etc.)

   - Goal 1

   - Goal 2

   - Goal 3

2. How will we know when the mentee has achieved these goals? What will be different? <list evaluation metrics>

Step 2: MUTUALLY AGREED-UPON MEETING TIME/PLACE/FREQUENCY (IF POSSIBLE)
1. We commit to meet <select a period: daily/weekly/monthly, etc.> and make every effort to prioritize our time together.
2. We will meet <place/time>.
3. We agree to meet for <duration of the mentorship>. At the end of that period, we agree to evaluate the effectiveness and outcomes of the mentorship.
4. If one of us cannot meet, we agree to communicate with the other at least <time period> in advance of our meeting time.
5. In the event that either of us finds this mentorship unproductive or ineffective, we agree to terminate the mentorship without blame or hard feelings.
6. Required resources and references include <list>.

Step 3: AGREE UPON VALUES & EXPECTATIONS
1. We agree to be mutually respectful.
2. We agree to be honest and constructive in our interaction.
3. We agree to keep each other's counsel. Any sensitive issues that we discuss will be held in the strictest of confidence. Issues that are off limits for discussion include <list>.
4. We agree to complete assigned reading, research, etc. prior to the meeting at which it will be discussed to optimize our time together.

Sample Mentoring Agreement

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Mentoring Tips

In Greek mythology, Odysseus' trusted counsel and friend, Mentor, cared for his household and served
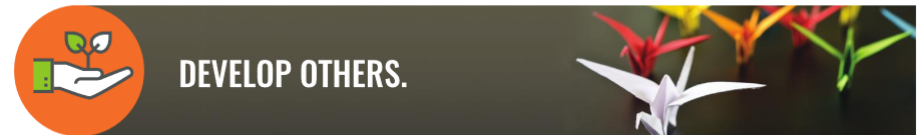
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Six Tips to Start a Lending Library

A lending library is a great way to develop other case managers in your organization, community or in your local CMSA or NASW chapter. A lending library allows case managers to share materials to study for the CCM exam. Here are six tips to get your lending library up and running.

1. **Gather your team**. Although a lending library doesn't have to be complicated, it's helpful to share leadership and ideas with others in your organization who share your passion for the project.
2. **Ask for book and resource donations.** Your local CCM community is likely to have many of the books listed on CCMC's Suggested Reference List already. Ask your colleagues to scour their homes and offices and donate case management resources to the lending library.
   a. Others in your organization may want to donate funds to purchase books, labeling materials or volunteer to set up an online lending application.
   b. Keep a record of donations so you can give credit where credit is due.
   c. Ask donors to write a brief review of each item, or a paragraph about how it helped them prepare for the CCM exam.
3. **Decide where your collection will be housed and how lending will operate. Choose from either an online lending library or a centrally-based one.**

	Advantages	Drawbacks
Online Lending/Sharing	Online application (like LendItems.com, a shared Google spreadsheet or a closed Facebook group). There are free options for small libraries. Also, see the American Library Association's	Involves shipping, packaging and monitoring when items are returned. Your library leadership team will need to set parameters around lender and borrower responsibilities to keep inventories and listings up to date.

...and more resources for mentoring

PLUS additional resource links:

- The **CCM Quick Guide**, including the definition and philosophy of case management, scope of practice overview, CCM exam knowledge domains and Code of Professional Conduct for Case Managers

- A **Pocket Prep Map** to create a study roadmap for your journey

- CCMC's official **CCM Glossary App**

- Quick Overview videos to "Get Certified" and "Develop Others"

- **Workforce Development Assessment tool**

- **Blogs** to inspire and share tips for preparing for the CCM exam

- Free **webinar recordings, issue briefs, podcasts, toolkits and resources** to stimulate discussion or use for a brown-bag lunch

CCM Glossary App

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Mentoring New Case Managers:

Articulating Local Knowledge

June 18, 2019

Patricia Benner, RN, PhD, FAAN
Professor Emerita
University of California at San Francisco

Identifying the Local, Specific Domains of Practice in A Case Management Practice

- In addition to the specialty nursing and medical knowledge required by case managers, much local practice/practical knowledge is required.

- Mentoring in case management is essential because case management requires so much informal local knowledge.

- Much of the knowledge of case management is unarticulated…hidden, non adequately captured in job descriptions or procedure guidelines.

Using the Comprehensive and Unique Care Demands of Military Transport System of The Care of Wounded Servicemen

- Never has communication from one agency to another been higher or more complex.

- I will use this new complex form of case management to consider the possible and probable demands of the case manager role.

Case Management has Become a Key Source of Organizational Reliability in High Tech, Specialty Medicine

- Inherent collisions/cross-purposes between managerialism and standardized routines, over-simplification enemy of high reliability organizations with cultures of safety, mindfulness, and continuous quality improvement

- Case Management a resource for increasing **reliability** in complex, risky, health care environments.

Catching up with High Reliability and Positive Deviation Research in Quality Improvement Science

- <u>1987:</u>HRO introduced by G.L. Rochlin, T.R. La Porte, & Karlene H. Roberts, Carrier Flight Operation at Sea. *Naval College Review <u>40:</u>* 614-624.

- 23 years Lag

- <u>2006</u> HRO introduced to Health Care Safety: Madsen, P. , Desai, V., Karlene H. Roberts, and D. Wong: Mitigating Hazards in Pediatric ICU. *Organizational Science <u>17:</u>* 239-248

Case Manager Role: Managing Patient Transitions

- Wounded Servicemember Transitions:

- From: Infield war injury, acute care and recovery, rehabilitation, and return to home or long-term care.

Case Management Role: Meeting, Knowing, and Tracking Patients' Illness-Rehab Trajectory

- Discontinuity, mis-information, and information gaps are key patient care quality issues in case management.

Case Manager's Role: Simplifying Point(s) of Contact Between Institutions

- Developing local knowledge between organizational points of contact.

- Identifying singular organizational point of contact for troubleshooting and problem solving.

Case Manager Role: Knowing Patient and Integrating and Coordinating Care

- Patient and family strengths.

- Functional care needs.

- Patient/family Concerns

Case Manager Role: Patient Advocate

- Patient education and information needs are complex and often overwhelming for patients and families.

- Assertiveness training for patients and families won't work when they have great primary and secondary ignorance.

- Active listening, attentiveness and curiosity required for effective patient advocacy.

- Keep track of frequent "problem areas"

- Inform the system when there is "push back" for advocacy!

Case Manager Role: Advocating for Supportive Living Environments

- This takes clinical and lifeworld imagination and…

- Good assessments of living environments…including transportation, social contacts and many more.

Articulating Local Knowledge, Making All Aspects of the Case Manager Role Public…Visible to Mentee, to Self

- Case management is a relatively new nursing role, at least in formal positions.

- Making the knowledge, skilled-know-how, and local knowledge are central roles of all case managers, and especially case manager mentors.

Question and Answer Session

Patricia Benner, R.N., Ph.D., FAAN
Professor Emerita
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Thank you!

- Please fill out the survey after today's session
- Those who signed up for continuing education will receive an evaluation from the Commission.
- A recording of today's webinar and slides will be available in one week at http://ccmcertification.org

Commission for Case Manager Certification

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